Finish Carpentry Plugin

User Guide

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PlanSwift
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Overview

This guide will teach you how to properly use the tools and features found within the Finish Carpentry Plugin [???or starter pack]. It 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:

<div align="center">

PlanSwift® Technical Support

support@PlanSwift.com

1-888-752-6794 ext. 2

</div>

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

<div align="center">

PlanSwift® Training Department

training@PlanSwift.com

1-888-752-6794 ext. 6

</div>

Purchasing and Installation

Purchasing Plugins

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

<div align="center">

PlanSwift® Sales

sales@PlanSwift.com

1-888-752-6794 Ext. 1

</div>

Installation and Uninstallation

Installing and uninstalling plugins and starter packs 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.
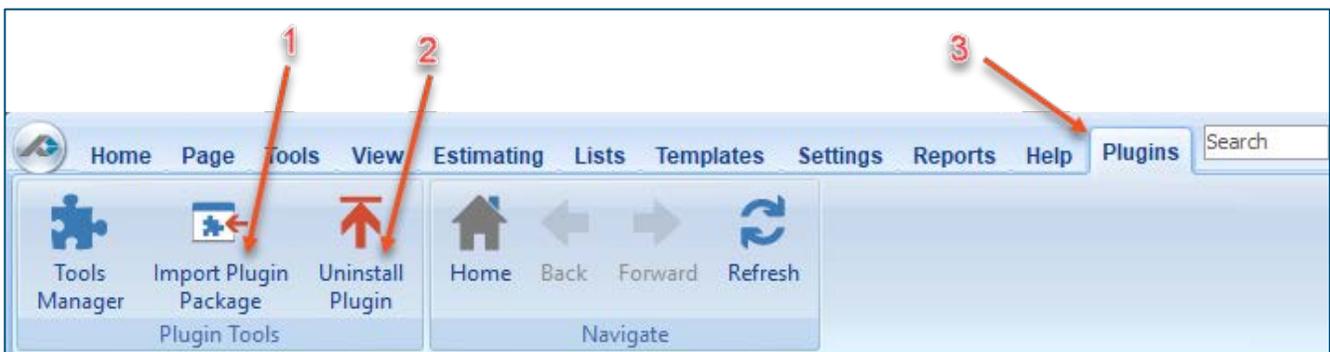

Figure 1

Features

The ?? Starter Pack includes ?? and ?? found in the Templates tab of PlanSwift [or the following general categories—see general contracting starter pack for an example???]. These are listed in the Compendium at the end of this guide. With these ?? assemblies and parts, PlanSwift users can easily customize assemblies and parts for later use. Starter Packs contain a large library of prebuilt templates, parts and assemblies. Modifying the library of parts and assemblies for any Starter Pack allows users the

ability to customize their Templates to their specific needs. Users will save countless hours of setup by utilizing a Starter Pack as their starting point for building custom parts and assemblies. The instructions below will guide new users through the basics of modifying parts and assemblies. We highly recommend purchasing a training package for accelerated learning and faster customization.

How To

How to: Copy and Paste an Assembly

The purpose of copying and pasting an assembly is to allow the user to copy and then modify the assembly for later use. As an example, you may want two different assemblies: one might include a part, and another might have an alternative part or not include that part at all. By copying one assembly and then modifying and renaming the copy (for easy identification), you can have two different assemblies available, allowing for easier and faster takeoffs. Figure 2 shows the **Templates Tab** (arrow 1) and the **Area Takeoff Item Example 1** assembly (arrow 2). If you want to add another assembly but with no **Material 3**, then you would click on the assembly you want to copy (arrow 2), click on **Copy** (arrow 3), and then click on **Paste** (arrow 4).
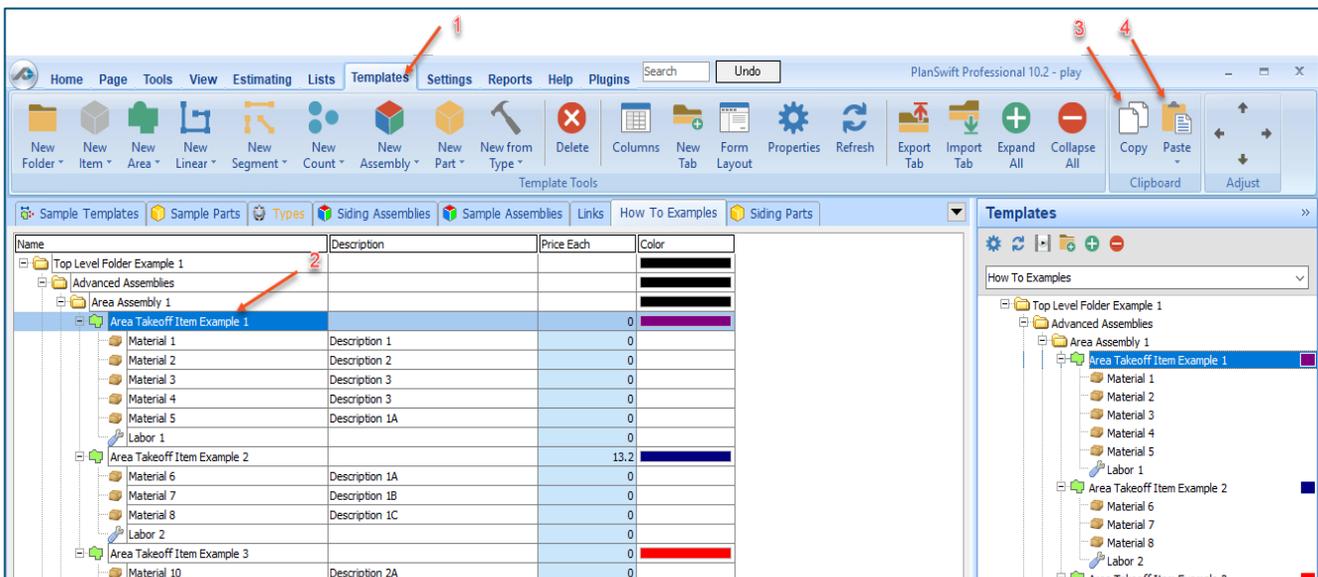

Figure 2

Figure 3 shows the original (arrows 1) and new **Area Takeoff Item Example 1** assembly (arrow 2). To delete the **Material 3** (arrow 3) from the newly created **Area Takeoff Item Example 1** assembly (arrow 2), click on **Material 3** (arrow 3), click on **Delete** (arrow 4), and click on **OK** in the popup window to confirm the deletion.
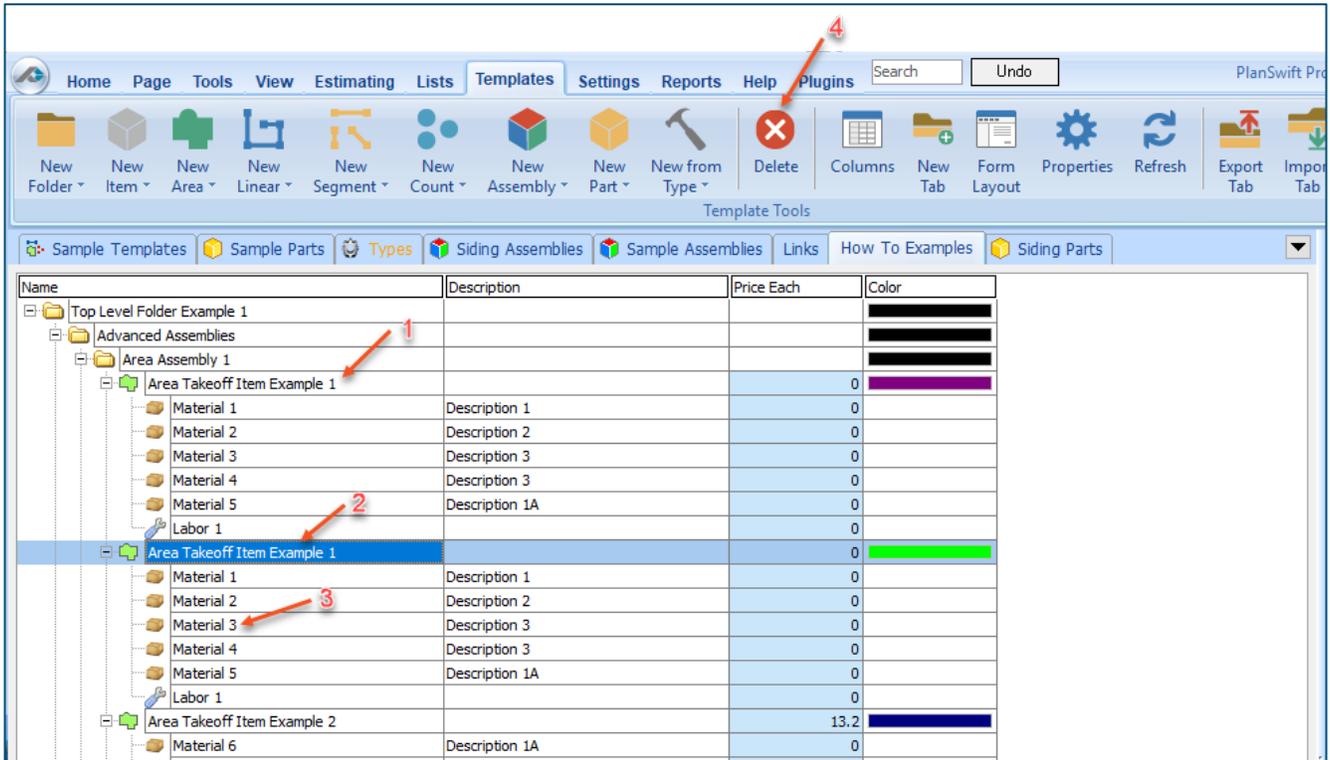

Figure 3

Figure 4 now shows the two assemblies, one with (arrow 1) and one without (arrow 2) the **Material 3** item. You can now change the description of the duplicated **Area Takeoff Item Example 1** (arrow 3) without the **Material 3** item by double-clicking the duplicate **Area Takeoff Item Example 1** (arrow 3).
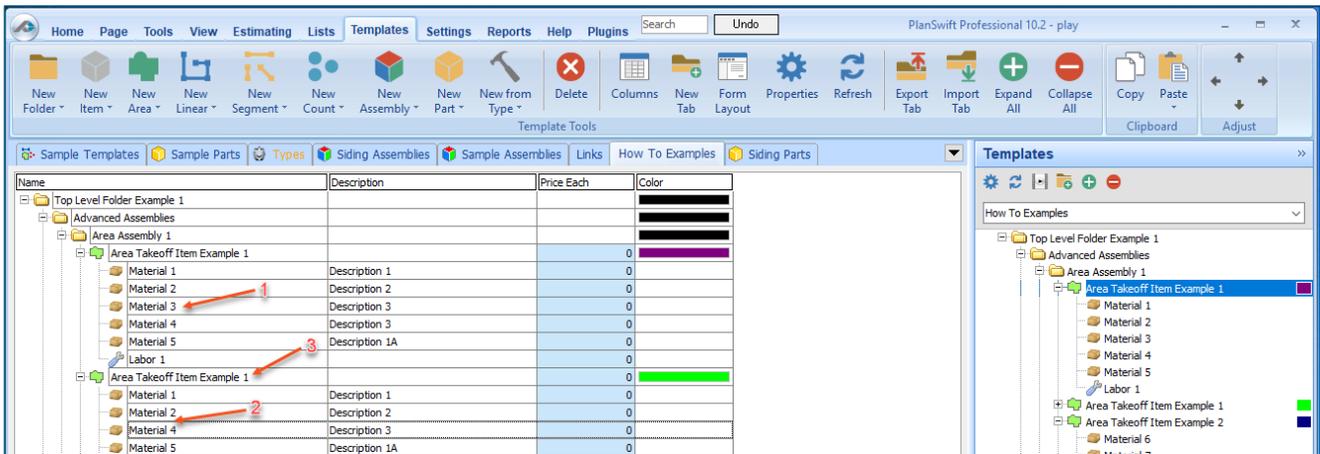

Figure 4

This opens the **Properties – [Area Takeoff Item Example 1]** window (Figure 5) where you can change the assembly's name to something like **Area Takeoff Item Example 1— No Material 3** to make it easier to identify.
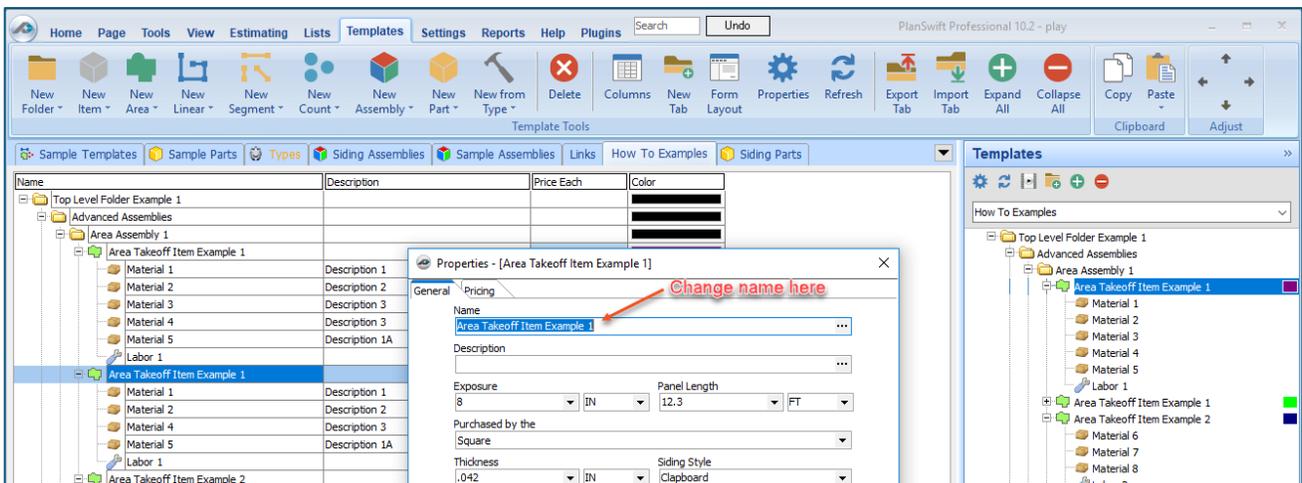

Figure 5

Click on **Ok** in the **Properties** window after you have entered the name. Figure 6 shows the new name.
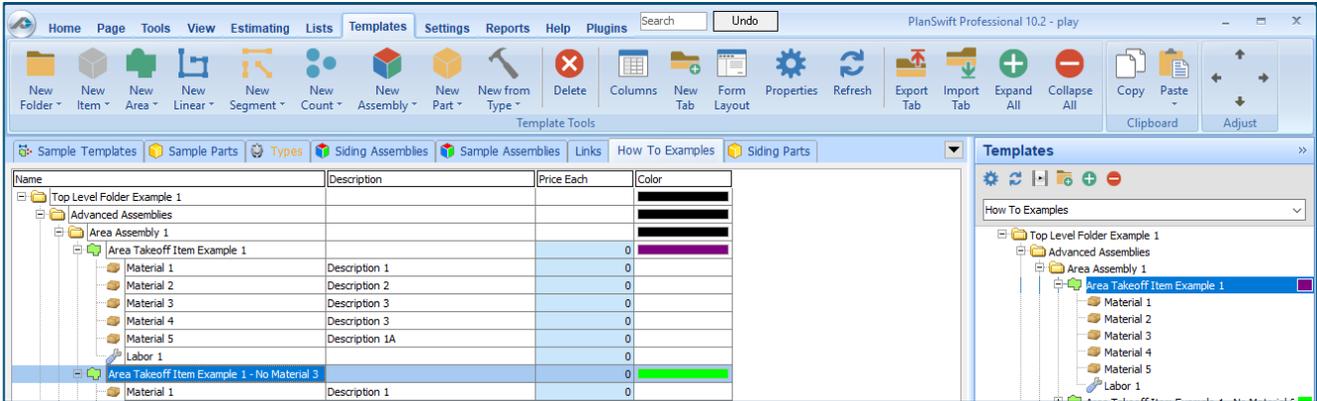

Figure 6

To perform a takeoff with the **Area Takeoff Item Example 1—No Material 3** assembly, go to the takeoff page, click on the green **Record Button** (see the arrow in Figure 7) in the **Templates** sidebar window, and then proceed to do your takeoff.
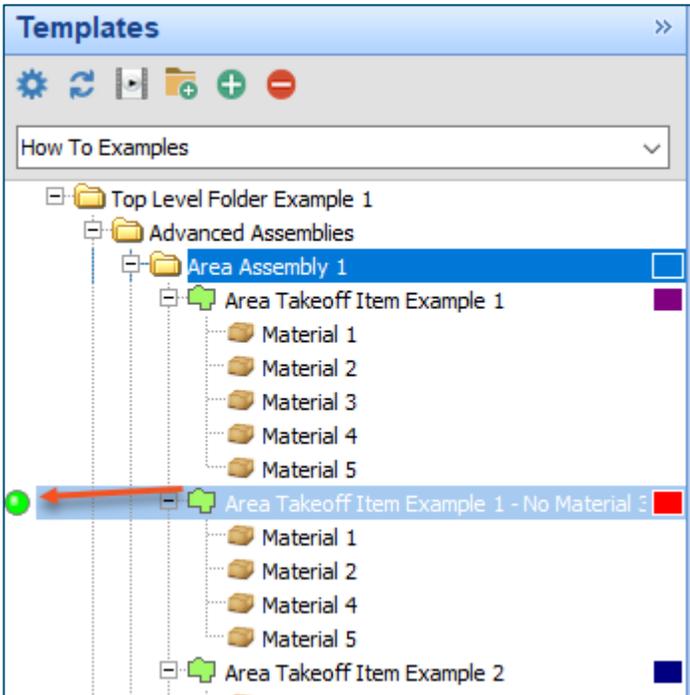

Figure 7

Disclaimer
Any modifications that a user makes to a Starter Pack should always be tested and verified by that user to ensure quantities and calculations are accurate. PlanSwift cannot verify the accuracy of modifications made to templates, parts and assemblies by the user.

How to: Copy and Paste Parts

Copying and pasting parts is handled similarly to copying and pasting an assembly. If, for instance, you want to move **Material 6** in **Area Takeoff Item Example 2** to **Area Takeoff Item Example 1**, click on **Material 6** (arrow 1), then click on copy (arrow 2) as shown in Figure 8.
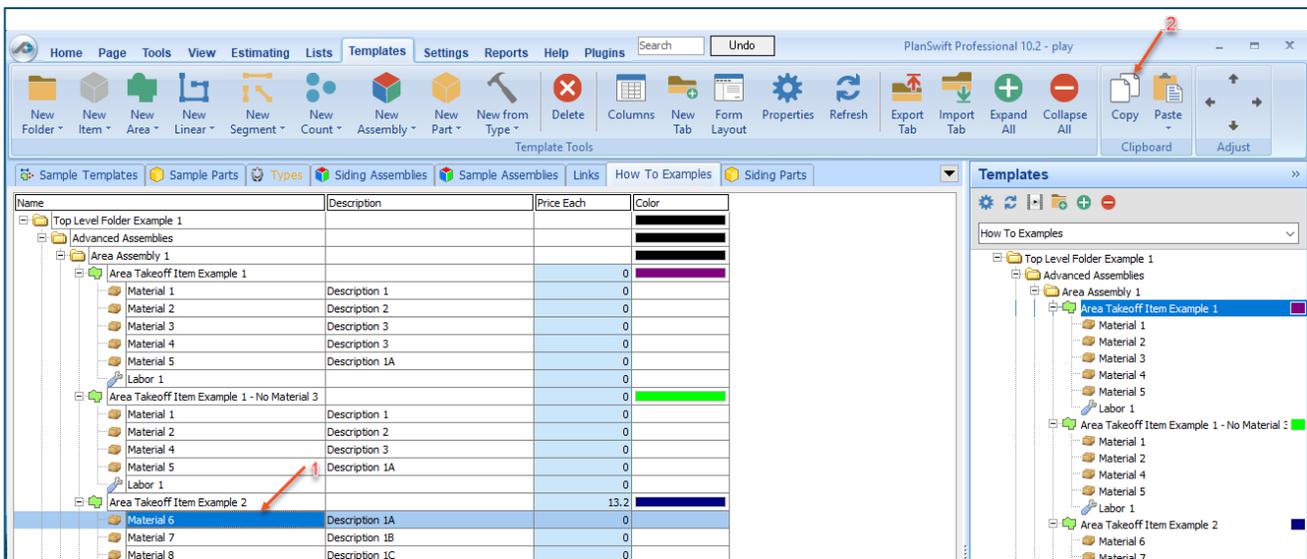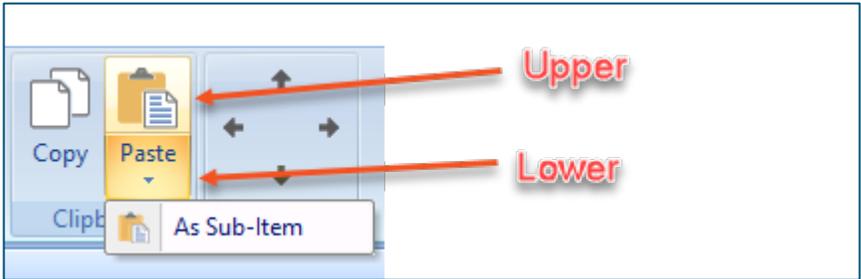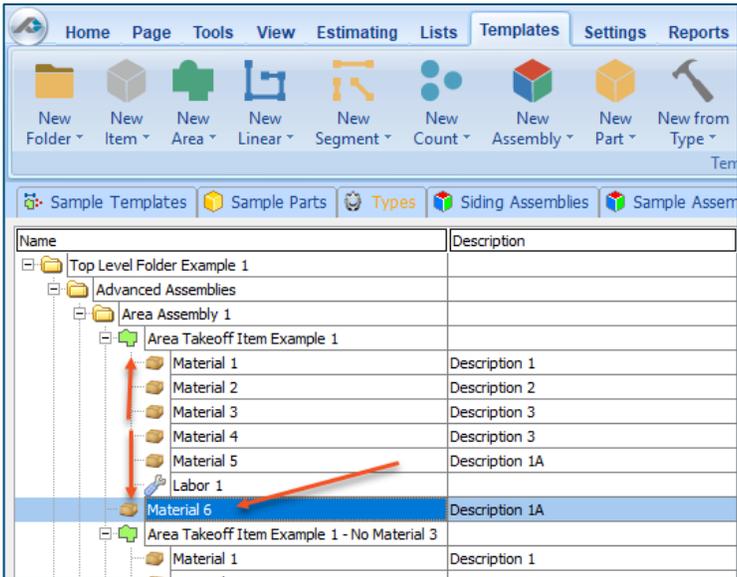

Figure 8

There are now two ways to paste the part. The first is to paste it at the same hierarchical level of a selected item, and the second is to paste it as a sub-item of a selected item. Figure 9 shows the **Paste** button. Clicking on the top portion of the button pastes the part at the same hierarchical level of a selected item. Clicking on the bottom (down-arrow) part of the button, then selecting **As Sub-Item** pastes the part as a sub-item of the selected item.
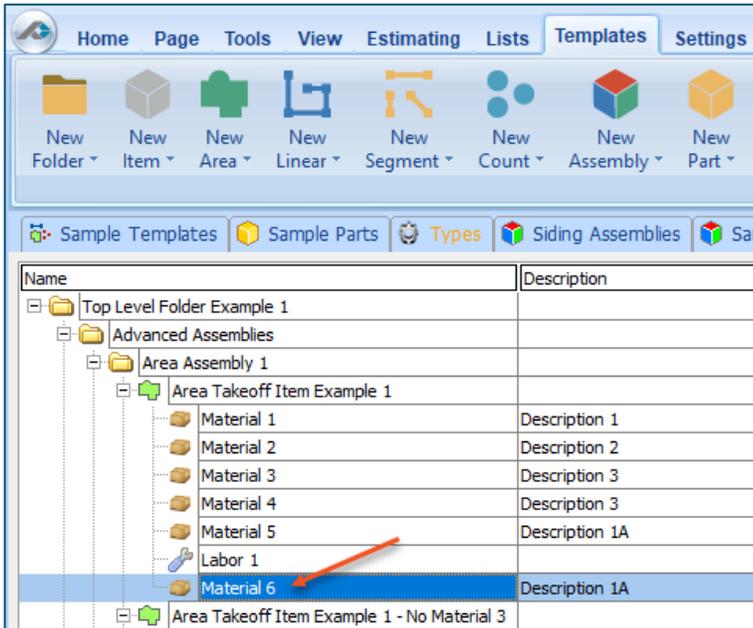

Figure 9

Click on **Area Takeoff Item Example 1**, then click on the top part of **Paste**. As shown in Figure 10, **Material 6** gets pasted at the same hierarchical level as **Area Takeoff Item Example 1**.
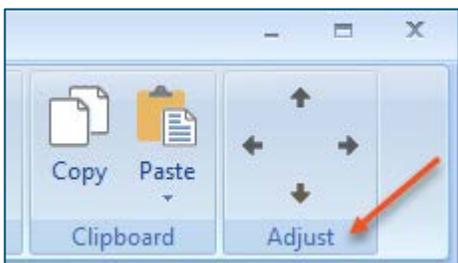

Figure 10

If you had selected the lower part of the **Paste** button, then **Material 6** would be a sub-item of **Area Takeoff Item Example 1**. Figure 11 shows **Material 6** as a sub-item.
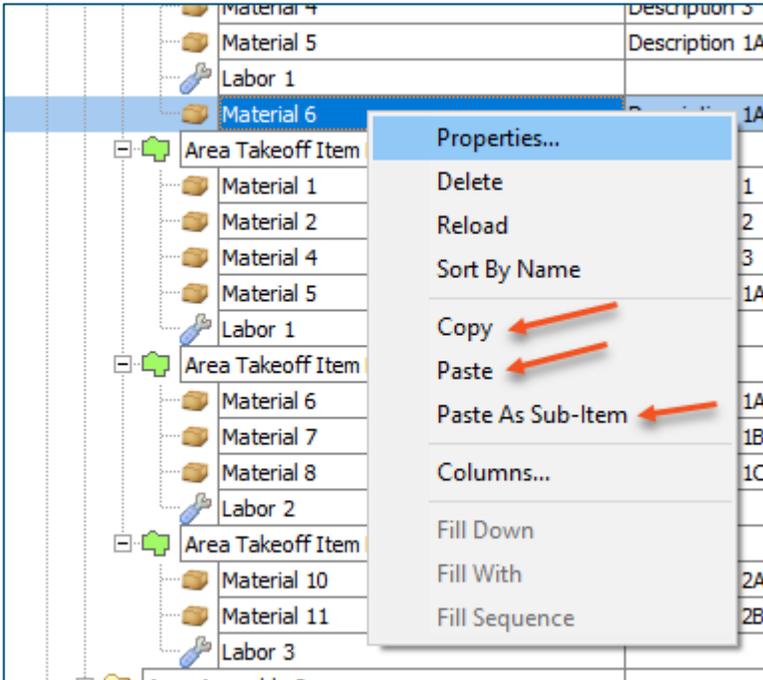

Figure 11

Another way to adjust the hierarchy of an item, such as **Material 6**, is to use the Main Ribbon bar arrow **Adjust** keys (Figure 12).
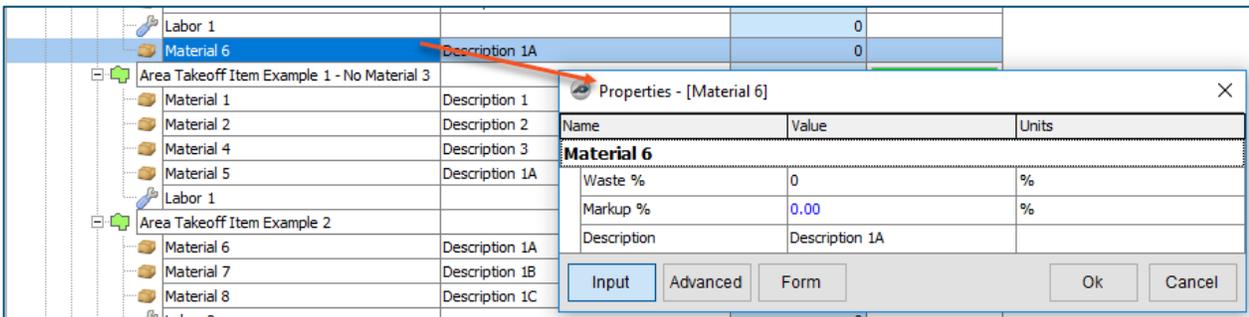

Figure 12

The left and right **Adjust** arrows move the item left and right (up or down) in the hierarchy, and the up and down **Adjust** arrows keys moves the item higher and lower in the list of items.

A shortcut to the **Copy** and **Paste** and **Past as Sub-Item** selections is available with a right-click menu. Figure 13 shows the **Copy, Paste**, and **Paste As Sub-Item** options on the right-click menu when **Material 6** is right-clicked on.

Figure 13

Double-clicking on **Material 6** allows you to change the name of the item and alter other properties of the item (Figure 14). To change the name of **Material 6**, double-click on the **Material 6** name, type the new name, and click on **Ok**.

Figure 14

Figure 15 shows **Material 6** renamed to **Material 6A**.

Figure 15

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How to: Drag and Drop Parts

Parts may be dragged and dropped from one assembly to another assembly. If, for instance, you want to drag the **Material 8** item from **Area Takeoff Item Example 2** up to **Area Takeoff Item Example 1**, click on **Material 8** and drag it up to just below **Material 6A** (see Figure 16) and release the mouse button.
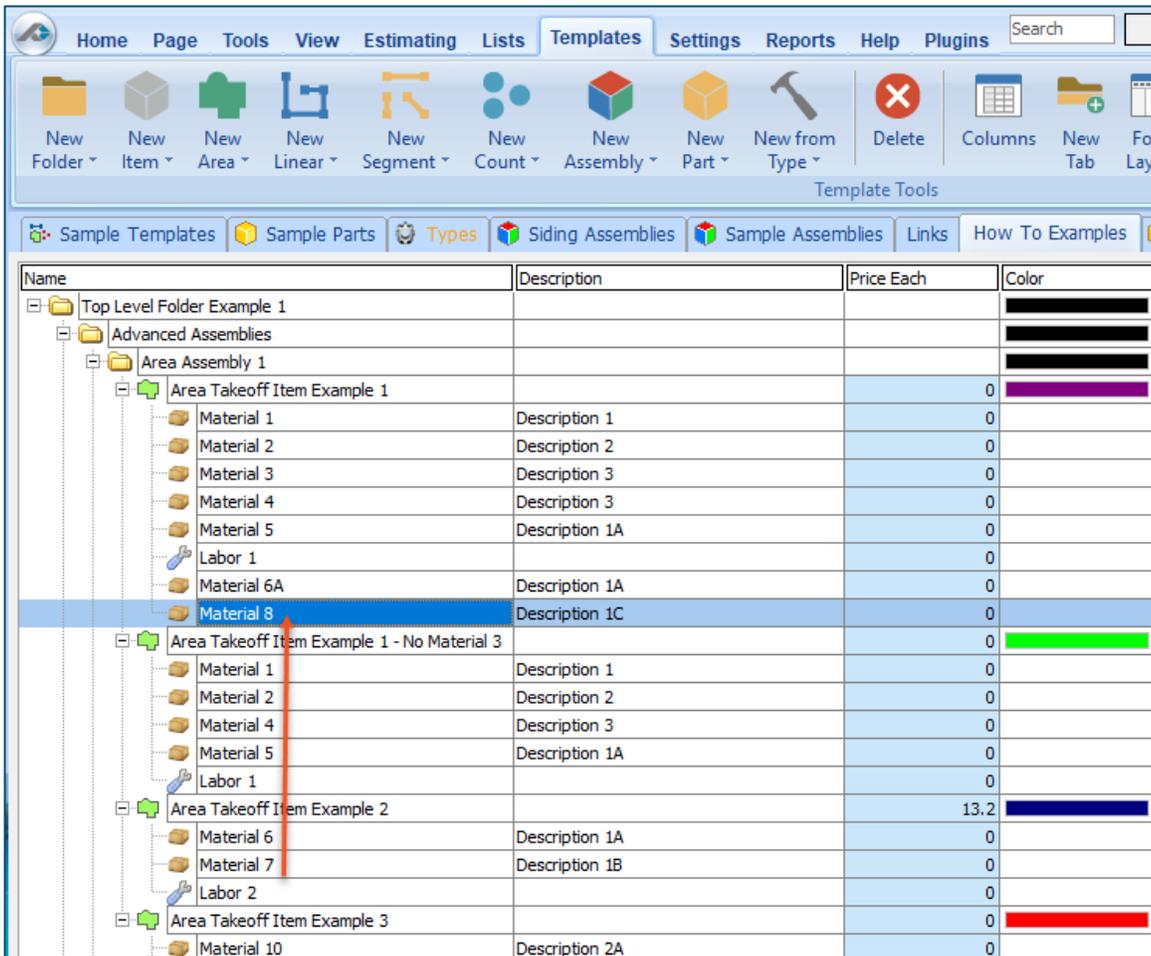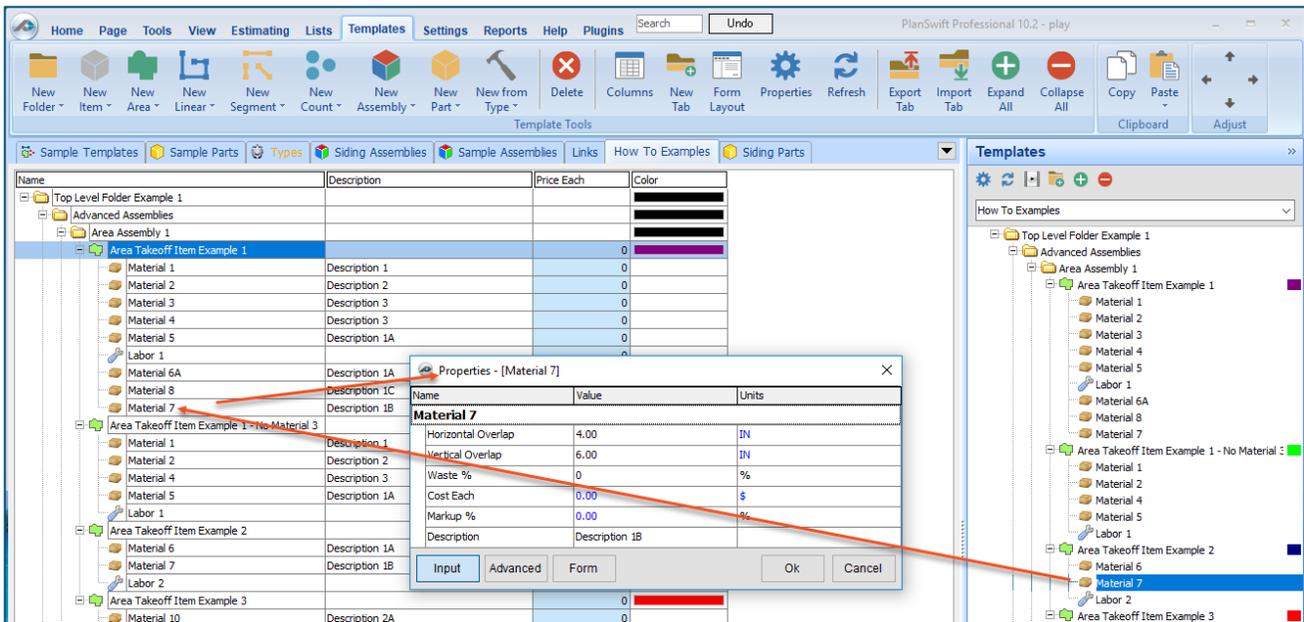

Figure 16

Notice that dragging the part this way *moves* the part from the **Example 2** assembly to the **Example 1** assembly, *not* leaving behind a copy.

The **Templates** sidebar window is a summarized view of everything in the Templates Tab. It is designed for easily dragging and dropping parts and for quickly launching takeoff templates and assemblies.

Parts may be dragged over from the **Templates** sidebar window into the **Templates Tab** window; note that dragging any part from the **Templates** sidebar window makes a copy of it. If, for instance, you want a **Material 7** item added to **Area Takeoff Item Example 1** as a sub-item, simply drag the **Material 7** from the right **Templates** sidebar window over on top of **Area Takeoff Item Example 1** label and release the mouse button. (Figure 17).

Figure 17

Figure 17 shows the **Material 7** item in place after it was dropped on top of **Area Takeoff Item Example 1.** In addition, the **Properties – [Material 7]** window automatically opens, allowing the user to change any properties for **Material 7**. Click on **Ok** to close the **Properties – [Material 7]** window.

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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: Does the Starter Pack include everything a contractor will need to generate an estimate?

   Answer: No. A Starter Pack is a tool to get you started toward creating a complete estimate. For example, the Starter Pack does not include industry pricing for materials and labor. However, you can supply prices for materials and labor on the assemblies and labor included in the Starter Pack.

Question: Do I have to input all the pricing for all my parts?

   Answer: Inputting pricing is optional. You can use the Starter Pack to generate quantities that you can then send to your supplier, who can then provide you current pricing. Inputting pricing on your own is optional. If your industry's pricing is not subject to frequent changes, you may want to consider inputting your pricing in PlanSwift.

Compendium

?? Assemblies

?? Assemblies -- ??, ??, ??