

# **Corporate Control User Guide**

# Updated on 2/1/2019

Authored by Dave Hansen

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### Overview

This PlanSwift Corporate Control User Guide will guide you in managing PlanSwift users from the Corporate Control Dashboard, including:

- Logging in
- Viewing and downloading User Summary, License Distribution, and Training Distribution Reports
- Viewing Branches
- Creating Branches
- Adding Users
- Moving Users from one Branch to another
- Viewing Activation Status
- Viewing Licensing Status
- Nuking Users.

# Logging into the Corporate Control Dashboard

PlanSwift provides a secure means of logging into the Corporate Control Dashboard using the following link:

#### https://cc.planswift.com/login

Figure A-1 shows the login window. Use the credentials (**E-Mail Address** and **Password**) your administrator provided you to log in. Click on **FORGOT YOUR PASSWORD** if you have forgotten your password, and you will receive an email allowing you to reset your password.

PlanSwift - Corporate Control × +
← → C ☆ 🏻 https://cc.planswift.com/login
De planswift
Sign in with your PlanSwift MyAccount credentials
E-Mail Address
Password
LOGIN FORGOT YOUR PASSWORD?

Figure A-1

After you log in, the **Corporate Control Dashboard** appears (Figure A-2). Three quick CSV lists (which can be opened in Excel) can be selected from this **Dashboard**:

- USER LIST (Figure A-3)
- LOCATION LIST (Figure A-4
- LICENSE USE REPORT (labeled the User Summary Report, Figure A-5). This report is also available under the **Reports** tab.

PlanSwift - Corporate Control					- 🗆 X
← → C △ ● https://c	c.planswift.com/dashboard				● ● ♥   🝚 : — E3080 🕑 PROFILE
The #2 Strengt & Estimating Software				Flanswit Enterprise	
Corporate Accounts	Corporate Control Dashboard				
Reports	Headquarters Information				
Branches	Derrek Russell Bountiful, UT				
	Seat Counts				
	Edition	Total Owned	Unassigned		
	Quick CSV Download Links				
	LICENSE USE REPORT				

Figure A-2

	AutoSave 💽 🗄 🏷 🤆				UsersList (4).csv - Exc	cel
F	File Home Insert Pa	ge Layout 🛛 A	Formulas Data	Review View Help Acro	bat PlanSwift	
ſ	Calibri	* 11	- A^ A =	≡ = ॐ - ce Wrap Text	General	-
Pi	aste ↓ Copy ▼ aste ✓ Format Painter B I	<u>U</u> •   = •	<u>∽ ∧</u> - ≡	≡ Ξ 😇 😇 🖽 Merge & Center 🔹	\$ - % 9 🔝	.00 →0 Formatting
	Clipboard 5	Font	ra l	Alignment 🕞	Number	Es l
A	11 · · · × ·	f <sub>x</sub>				
4	A	В	С	D	E	F
1	LocationName	LocationID	Name	email	phone	AccessLevel
2	Enterprise NFR Account	423444	Naveen Hossain	hossain.naveen@gmail.com	8887526794	Administrator
				an a share a foly share all so as	(000) 750, 6704	Administrator
3	Enterprise NFR Account	423446		moshnee@hotmail.com	(888) 752-6794	Administrator
3 4	Enterprise NFR Account Enterprise Business Unit	423446 425630		entadmin@planswift.com	(888) /52-6/94	Enabled
_	· · · ·	425630		-	3854243900	
4	Enterprise Business Unit	425630	Derrek Russell	entadmin@planswift.com	. ,	Enabled
4 5	Enterprise Business Unit PlanSwift - Enterprise Test Acc	425630 410653	Derrek Russell B E	entadmin@planswift.com markham.caldwell@planswift.com	3854243900	Enabled Administrator
4 5 6	Enterprise Business Unit PlanSwift - Enterprise Test Acc Enterprise Business Unit	425630 410653 425630		entadmin@planswift.com markham.caldwell@planswift.com derrek.russell@planswift1.com	3854243900 (801) 896-9683	Enabled Administrator Account Owner
4 5 6 7	Enterprise Business Unit PlanSwift - Enterprise Test Acc Enterprise Business Unit Test Construction Inc.	425630 410653 425630 510629	BE	entadmin@planswift.com markham.caldwell@planswift.com derrek.russell@planswift1.com test@uniqueemailaddress.COM	3854243900 (801) 896-9683 555-555-5555	Enabled Administrator Account Owner Enabled

#### Figure A-3

	AutoSave 💽 🛛	日 り・ C・ =					LocationList (2)
F	ile Home	Insert Page Layout	Formulas	Data R	leview \	/iew Help	Acrobat PlanS
Pa	Cut	nter	<u>⊘</u> , <u>A</u> -	≡≡∎ ≣≡≡	€= →=	란 Wrap Text 현 Merge & Center	
	Clipboard	ra Font	Es.		Alignm	ient	🖫 Numb
F3	88 🔻 :	× √ f <sub>x</sub> Name	3				
	А	В	с	D	E	F	G
1	LocationID	Name	City	State	Age	ContactName	ContactPhone
2	510681	Test Hotel Group	Cody	WY	23	Name 1	435-555-1234
3	510680	Test Construction Inc.	Cheyenne	WY	54	Name 2	435-555-1234
4	510679	Test Const Inc	Cheyenne	WY	15	Name 3	435-555-1234
5	510678	Test Hotel Group	Cody	WY	15	Name 4	435-555-1234
6	510677	Test Construction Inc.	Cheyenne	WY	15	Name 1	435-555-1234
7	510676	Test Const Inc	Cheyenne	WY	15	Name 2	435-555-1234
8	510657	Test Hotel Group	Cheyenne	WY	15	Name 3	435-555-1234
9	510656	Test Construction Inc.	Cody	WY	15	Name 4	435-555-1234
10	510655	Test Const Inc	Cheyenne	WY	15	Name 1	435-555-1234
11	510654	Test Hotel Group	Cheyenne	WY	15	Name 2	435-555-1234
12	510653	Test Construction Inc.	Cheyenne	WY	15	Name 3	435-555-1234
13	510652	Test Const Inc	Cheyenne	WY	15	Name 4	435-555-1234
14	510651	Test Hotel Group	Cheyenne	WY	15	Name 1	435-555-1234
15	510650	Test Construction Inc.	Evanston	WY	15	Name 2	435-555-1234
16	510649	Test Const Inc	Cody	WY	15	Name 3	435-555-1234
17	510648	Test Hotel Group	Evanston	WY	15	Name 4	435-555-1234
18	510647	Test Construction Inc.	Evanston	WY	15	Name 1	435-555-1234

#### Figure A-4

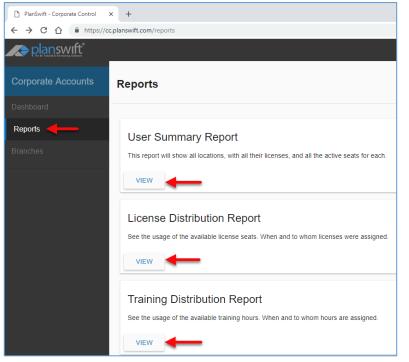
AutoSave 💽 🛱 🏸 🖓 =		UserSummaryReport (1).csv - Excel		🛕 Dave Hansen 📧 —
File Home Insert Page Layout Formulas Data Review	View Help Acrobat PlanSwift 🔎 1	ell me what you want to do		r Share 🖓 C
V Format Painter		Conditional Format as Check Cell Explanatory Input Styles	Neutral         Calculation           Linked Cell         Note	Insert Delete Format Cells
A1 * : × ✓ fx CustomerID				
A B C D E	E F G H	I J K	L M N	O P Q R
1 CustomerID CustomerName LicenseID LicenseDescription SeatsU	sUsed LicenseSeats LicenseTypeLicenseExpireDate	MaintenanceExpireDate ActivationID ActivationComputerID	ActivationCom ActivationUser ActivationDate	ActivationExpireDate ActivationEmail
2 496081 Derrek R Russell 1000486068 Professional 10.2 License	1 1 Trial 3/7/2020 0:00	3/7/2020 0:00 5281570 6632-23-2255	RUSSEL-0082 Derrek.Russell 1/4/2019	1/15/2019 derrek.russell@yahoo.com
3				

Figure A-5

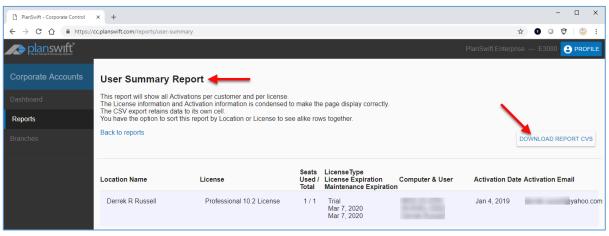
# Viewing and Downloading Reports

The **Dashboard** also allows you to view **Reports** under the **Reports** tab (Figure B-1). Clicking on the **Reports** tab displays three reports that are available:

User Summary Report (shown in Figure B-2). This report shows all locations, with all their licenses, and all active seats for each. The DOWNLOAD REPORT CVS button on the User Summary Report creates the same report as shown in Figure A-5.



#### Figure B-1





 License Distribution Report (Figure B-3). This report shows the usage of available license seats and when and to whom licenses were assigned. The DOWNLOAD REPORT CVS button on the License Distribution Report has not yet been implemented.

🗅 PlanSwift - Corporate	Control × +						- □ >
← → C ☆	https://cc.planswift.com/report	s/license-distribution				\$	O O 🗘 😳
	ft°					PlanSwift Enterprise	
Corporate Accounts	License Distri	ibution Report 🗲 🗕	_				
	You can filter by Edition	y time so all entries are preserved on to see how that one License Po	ol has chang	ed over time.		and at that time	
Reports	Back to reports	nn is empty, that means the pool its	sell was char	igea, no licenses	were assign		
						DO	WNLOAD REPORT CSV
	Filter By Edition: 👻	Start Date 12/2/2018 Time	End Date 1/31/2019	CHANG	E DATE FILTE	ER	
	Edition	Location	ChangeAva	ilable	Time	Note	User
	Pro Metric	PlanSwift - Enterprise Test Account		0 Jan 04, 20		1 seats given to location	Mark
	Professional	PlanSwift - Enterprise Test Account	-1	2 Jan 04, 20	19 12:30	1 seats given to location	Mark
	Professional		50	52 Jan 04, 20	19 12:34	Because	Mark
	Professional	"Selected Branch 2"	-1	51 Jan 30, 20		1 seats given to location	Dave i

Figure B-3

• **Training Distribution Report**. This report has not yet been implemented.

# **Manipulating Branches**

The Dashboard also allows you to view **Branches** under the **Branches** tab (Figure C-1). **Branches** are used to store the **Users**. From here you can add new **Branches**, and access **Branches** for further manipulations.

# Adding a New Branch

Clicking on **Branches** displays **Branches** that have been created. Clicking on the **ADD NEW BRANCH** button allows you to create a new **Branch** (Figure C-2).

PlanSwift - Corporate Control	× New Tab	×   +						>
↔ → C ① ● https://	cc.planswift.com/brar	nches					☆ 0	0 🤨   😜 :
							PlanSwift Enterprise — E3	080 S PROFIL
Corporate Accounts	Branches	←						
	Hover the mous	mn by clicking the header. The Lifecycle e over the globe to see which partner tha	select will show you c t account belongs to.	ustomers in a spe	ecific sales catego	ory.		
	The icon on the	right side provides links to specific tabs.						
Branches 🗲	Soarch: Vou can	filter by Customer Number, Name or loc	ation		Lifoo	velo soloct	rows per page → ADD	NEW BRANCH
	ID • Owner I		City	State	Lifecycle	Age	Primary Contact	NEW BRANCH
	410653 🔇	PlanSwift - I	Bountiful	UT	MQL	891		
	423444 🕤	Enterprise	Bountiful	UT	Lead	793		
	423446 🕤	Enterprise	Bountiful	UT	Lead	793		
	425630 🔇	Enterprise			Lead	777		
	496081 🔇		Roy	UT	MQL	343		
	496109 🔇	Rental Control			Junk	343		
	510628 🔇	teriment.			Lead	275		
	510629 🕤	the contractor in				275		
	510630 🔇	Test Hotel Group				275		



Entering in the customer data for a new **Branch** and clicking on the **Save** button creates the new **Branch**.

PlanSwift - Corporate Control	X New Tab X +
$\leftarrow \rightarrow$ C $\triangle$ https://d	cc.planswift.com/branches/newBranch
Corporate Accounts	Create a New Branch!
Dashboard	Go Back You will make a new branch tied to this oragnization
Reports	
Branches	
	Customer Name
	Phone
	Email
	First Name Last Name
	Address
	Address 2
	City State Zip
	Country
	PlanSwift Trial Seats
	SAVE
	Address 2       City     State     Zip       Country       PlanSwift Trial Seats

Figure C-2

### Filtering and Searching for Branches

**Branches** listed in the **Branches** tab (Figure D-1) may be filtered by **ID**, **Owner**, **City**, **State**, **Lifecycle**, and **Age** (in days). Clicking on the column headings will reorder (filter) the **Branches**. The **Search** field allows you to search for any **Branch** by typing in any the beginning characters of any **Branch's ID**, **Owner**, **Name**, **City**, **State**, or **Lifecycle** field value, and all **Branches** that include the typed characters will be displayed. Once the **Branch** you want to manipulate is visible, click on it (or click on the blue **Bookmark** symbol to the right) to drill down into **Branch's** details.

PlanSwift - Corporate Control		×   +						- 0
- → C ☆ A https:/	/cc.planswift.com/bra	nches					\$	000
							PlanSwift Enterprise	— E3080 🙁 PROF
Corporate Accounts	Branches							
	Hover the mous	umn by clicking the header. The Lifecycle se over the globe to see which partner the	select will show you c at account belongs to.	ustomers in a spe	ecific sales categ	ory.		
	The icon on the	right side provides links to specific tabs.						
Branches	Search You	n filter by Customer Number, Name or loc	ation		Lifec	vole selec	t ▼ rows per page ▼	ADD NEW BRANCH
	ID • Owner		City	State	Lifecycle	Age	Primary Contac	
	410653 🔇	PlanSwift - I	Bountiful	UT	MQL	891		/
	423444 🕤	Enterprise	Bountiful	UT	Lead	793	Contacts Tab	
	423446 🕤	Enterprise	Bountiful	UT	Lead	793	Users Tab	
	425630 🄇	Enterprise			Lead	777	Licenses Tab	
	496081 🄇	1000	Roy	UT	MQL	343		Ņ
	496109 🄇	Rent and Control of			Junk	343		
	510628 🔇	for low m			Lead	275		Ņ
	510629 🔇					275		
	510630 🔇	Test Hotel Group				275		



### **Editing Branches**

Information about a **Branch** includes **Basic Details** (Figure D-2), the **Billing Address** (Figure D-3) and the **Shipping Address** (Figure D-4). Clicking on the **UPDATE** button after making any changes will update the changes.

Corporate Accounts	Location C
Dashboard	Basic location details and address.
Reports	
Branches	DETAILS USERS LICENSES TRAINING
	Basic Details
	Activation Number: Activation Pin:
	Location Name Enterprise Business Unit
	Phone
	Email
	@planswift.com
	UPDATE

#### Figure D-2

Billing Address Billing First Name	Billing Last Name
Billing Company Name	
Enterprise Acct Team	
Billing Phone	Billing Email @planswift.com
Address	
Address 2	
	State
City	▼ Zip
Country United States of America	-

Figure D-3

Shipping Company Name			
Shipping First Name		Shipping Last Name	
Address			
Address 2			
City	State	Zip	
Country			



# **Editing Features**

### Adding a New User to a Branch

Clicking on the **USERS** tab shows the **Users** included in a **Branch** (Figure E-1). To add a new **User**, click on the **ADD NEW** button.

PlanSwift - Corporate Control	× +	- 🗆 X
$\leftarrow$ $\rightarrow$ C $\triangle$ $$ https://	cc.planswift.com/branches/425630/details	<b>9</b> 0 🗘   🔤 E
Planswift		
Corporate Accounts	Location C - "Selected Branch"	•
Dashboard	All people associated with an account. These individuals have access to use the PlanSwift software licensed to this location. They also have access system when enabled.	s to the MyAccount
Reports		
Branches	DETAILS USERS LICENSES TRAINING	$\sim$ 1
	Show Activations	ADD NEW
	Sort By 👻	
	Derrek Russell Implementation Manager Account Owner Bountful, UT 84010 United States Work: (801)	٥
	D H	
	n@planswift1.com Administrator	•



You can now enter the contact information for the **User** (Figure E-2). To set the **User's** privileges, click on the **Admin Level**. Selecting **Administrator** gives the **User** administrative privileges. Selecting **Enabled** allows the **User** to login and use PlanSwift. Selecting **Disabled** prevents the **User** from logging in and from using PlanSwift and frees up the license. Clicking on **Save** creates the new **User**.

PlanSwift - Corporate Control ×	+			
← → C △ a https://ccplanswift.com/person/new/410653				
Corporate Accounts	Editing Contact for C410653	- PlanSwift - Enterprise Tes	t Account	
Dashboard	Go Back to the Branch view			
Reports				
Branches	First Name	Last Name		
	Title			
	Admin Level			
	Endoted			
	Email			
	Address			
	Address 2			
	City	State	Zip	
	Phone Number			
	Phone Number			
	SAVE			

Figure E-2

### Editing a User

From the **USERS** tab, clicking on the blue **Gear** button for the desired **User** opens a drop-down menu (Figure E-3).

Location C - "Selected All people associated with an account. These in system when enabled.		tware licensed to this location. They also h	ave access to the MyAccount
DETAILS USERS LICENSES	TRAINING		
Show Activations			ADD NEW
Sort By 💌			
Dentire R Implementation Manager I@planswift1.com Account Owner	Towne Drive Bountiful, UT 84010 United States	Work: (801)	<b>A</b>
D Ha i@planswift1.com Administrator			۵

Figure E-3

The drop-down menu selections allow you to **Edit**, **Reset Password**, **Move**, or **Delete** a **User** for the selected **User** (Figure E-4).

Location C - "Selecter All people associated with an account. These system when enabled.	ed Branch" e individuals have access to use the PlanSwift sof	ftware licensed to this location. They	also have access to the MyAccount
DETAILS USERS LICENSES	TRAINING		ADD NEW
D R Implementation Manager @planswift1.com	Towne Drive Bountiful, UT 84010	Work: (80	Edit
Dave Hansen	United States		Reset Password Move
@planswift1.com Administrator			Delete
Mike Temp Person Temp Worker none@msn.com Administrator	1234 No Name Street Layton, Utah 84010	: 800	<b>\$</b>

Figure E-4

Clicking on **Edit** from the drop-down menu opens an **Editing Contact** window (Figure E-5). **Contact** information as well as the **Admin Level** can be changed (to give the user administrative privileges and allow you to either enable or disable PlanSwift for the selected **User**).

Go Back to the Branch view		
First Name Mike Temp		t Name I <b>rSON</b>
Title Temp Worker		
Admin Level Administrator		
<sup>Email</sup> none@msn.com		
Address 1234 No Name Street		
Address 2		
<sub>City</sub> Layton	State Utah	Zip 84010
Phone Number 800-555-5555		
➡ Phone Number		

Figure E-5

### Resetting a User's Password

Selecting **Reset Password** from the drop-down menu sends an email to the **User** that has her password reset instructions.

	Edit Reset Password			
-	Move			
	Delete			
	Location C425	5630 - Ente	rprise Busin	ess Unit
	All people associated system when enabled.		These individuals ha	ve access to use the
	✓ The user has been	emailed with th	eir reset instructior	IS.
	DETAILS USE	RS LICENSI	ES TRAINING	

**Figure E-6** 

### **Moving Users between Branches**

Selecting **Move** (arrow 1, Figure E-7) opens a **Moving User** window. Clicking on the drop-down arrow (arrow 2) opens a drop-down list (arrow 3) of other available **Branches**. The **Search** field allows you to type the name of the **Branch** for quicker access. Clicking on a **Branch** moves the **User** into that **Branch**.

Edit
Reset Password
Move
Delete
Moving User none@msn.com
Go Back to the Branch view
You can move the user to any Location inside the Corporate Umbrella. Search by either location number or location name.
Search:
Destination Branch
SAVE
Moving User none@msn.com
Go Back to the Branch view
You can move the user to any Location inside the Corporate Umbrella. Search by either location number or location name.
Search:
Doctingtion Branch
510642 - Test Hotel Group
510641 - Test Construction Inc.
510640 - Test Const Inc
510639 - Test Hotel Group
510638 - Test Construction Inc.
· · · · · · · · · · · · · · · · · · ·



### Deleting a User from a Branch

Selecting **Delete** from the drop-down menu (Figure E-8) asks you to confirm the deletion. Clicking **OK** deletes the **User**.

**CAUTION:** The **Delete** option removes a user from a **Branch**. If, after deleting a **User**, you want to re-ad her, then you will have to contact PlanSwift Technical Support.

Edit
Reset Password
Move
Delete
cc.planswift.com says
Are you sure you would like to delete this user? OK Cancel

**Figure E-8** 

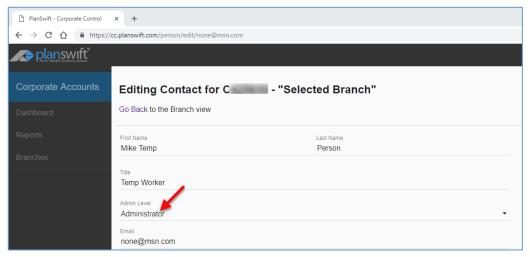
### **Enabling a User**

Users may be enabled from the **USERS** tab. Click on the blue **Gear** button for the User that needs to be enabled, and then select **Edit** from the drop-down menu (Figure E-9).

PlanSwift - Corporate Control	x +	- 🗆 X
← → C ☆ ≜ https://	cc.planswift.com/branches/425630/details	🖈 🔍 o 🗘 i 😜 i
planswift		Enterprise — E3080 🙁 PROFILE
Corporate Accounts	Location C     - "Selected Branch"  All people associated with an account. These individuals have access to use the PlanSwift software licensed to this location. They also h	ave access to the MyAccount
	system when enabled.	
Reports Branches	DETAILS USERS LICENSES TRAINING	
	Show Activations	ADD NEW
	Derrek Russell Implementation Manager Splanswift1.com Account Owner Work: (801) Bountiful, UT 84010 United States	0
	Dave Hansen I@planswift.com Administrator	0
	Mike Temp Person Temp Worker 1234 No Name Street none@msn.com Layton, Utah 84010 : 800-555-5555 Administrator	Edit Reset Password Move
		Delete

#### **Figure E-9**

Clicking on the Admin Level field opens a drop-down menu (Figure E-12).



From the drop-down menu, you can now select **Enabled** for the **User** (Figure E-11). Selecting **Enabled** and clicking on the **Save** button completes the change.

PlanSwift - Corporate Control × +			
← → C ☆ https://cc.planswift.com/person/edit/none@msn.com			
Planswift De #1 Talex() & Estimating Tell Ywer			
Corporate Accounts	Editing Contact for C	cted Branch"	
Dashboard	Go Back to the Branch view		
Reports	First Name Mike Temp	Last Name Person	
Branches	Disabled		
	Enabled		
	Administrator		
	Email none@msn.com		
	Address 1234 No Name Street		

Figure E-11

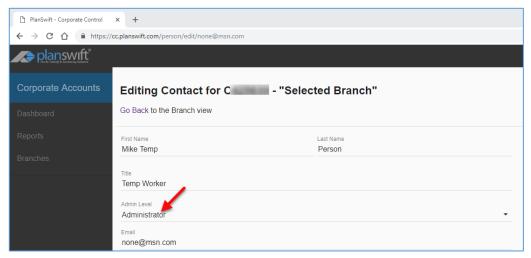
### Disabling a User

Users may be disabled from the **USERS** tab. Click on the blue **Gear** button for the **User** that needs to be enabled, and then select **Edit** from the drop-down menu.

PlanSwift - Corporate Control	× +	- 🗆 X
← → C ☆ 🔒 https://	cc.planswift.com/branches/425630/details	* 0 0 🤨 😌 :
stanswift 🖉		Enterprise — E3080 🙁 PROFILE
Corporate Accounts	Location C - "Selected Branch"	and accord to the Multisequet
Dashboard	All people associated with an account. These individuals have access to use the PlanSwift software licensed to this location. They also he system when enabled.	ive access to the MyAccount
Reports		
Branches -	DETAILS USERS LICENSES TRAINING	
	Show Activations	ADD NEW
	Sort By 💌	
	Derrek Russell Implementation Manager Impleme	¢
	Dave Hansen M@planswift1.com Administrator	¢
	Mike Temp Person	Edit
	Temp Worker 1234 No Name Street none@msn.com Layton, Utah 84010 :800-555-5555 Administrator	Reset Password Move
		Delete

Figure E-12

Clicking on the Admin Level field opens a drop-down menu (Figure E-13).



From the drop-down menu, you can now select **Disabled** for the **User** (Figure E-14). Selecting **Disabled** and clicking on the **Save** button completes the change.

Editing Contact for C425630 - "Selected Branch"						
Go Back to the Branch view						
First Name Mike Temp	Last Name Person					
Disabled						
Enabled						
Administrator						
Email none@msn.com						
Address 1234 No Name Street						

### **Giving Administrative Privileges**

Users may be given Administrative privileges from the **USERS** tab. Click on the blue **Gear** button for the **User** that needs to be given Administrative privileges, and then select **Edit** from the drop-down menu.

PlanSwift - Corporate Control	× +		- 🗆 X
	c.planswift.com/branches/425630/details		🖈 🛈 🍳 🤨 E
planswift			terprise — E3080 😫 PROFILE
Corporate Accounts	Location C - "Selected Branch"		2
Dashboard	All people associated with an account. These individuals have access to use the PlanSwift software lice system when enabled.	ensed to this location. They also have	access to the MyAccount
Reports			
Branches	DETAILS USERS LICENSES TRAINING		
	Show Activations		ADD NEW
	Sort By 💌		
	Derrek Russell Implementation Manager Optionswith com Account Owner Optionswith com Option Op	Vork: (801)	ę
	Dave Hansen v@planswift.com Administrator	<b>`</b>	0
	Mike Temp Person		Edit
	Temp Worker 1234 No Name Street none@msn.com Layton, Utah 84010 : 8 Administrator	800-555-5555	Reset Password Move
			Delete

Figure E-15

Clicking on the **Admin Level** field opens a drop-down menu (Figure E-16). Selecting **Administrator** and clicking on the **Save** button completes the change.

Editing Contact for C Go Back to the Branch view	- "Selected Branch"
First Name Mike Temp	Last Name Person
Disabled	
Enabled	
Administrator	
Email none@msn.com	

### Adding a New License

New Licenses can be added under the LICENSES tab (Figure F-1). Licenses can be filtered or sorted (just like Branches) by clicking on the column headers (Software Licenses, Type, and Expires). Clicking on the ADD NEW LICENSE button opens the Give a new license to Enterprise Business Unit window.

PlanSwift - Corporate Control	× +							-	- 🗆 X
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	Software Licenses PlanSwift Professional 10.2		Trial		Jul 5, 2019	Jul 5, 2019	1		÷
	Fightswirt Frolessional To.2		mai		5ur 5, 2019	Jul 3, 2019			*

#### Figure F-1

This **Give a new license** window allows you to select the **License Edition** and the **License Type** to give. Clicking on the down-arrow for **Edition to give** opens a drop-down with the available license editions. The **Version of Edition** is not implemented at this time. Clicking on the **License Type** down-arrow opens a drop-down menu allowing you to select whether the **License** was procured via a **Purchase** or a **Subscription**. The **Seats Available** field allows you to enter the number of **Seats** assigned to the **Branch**.

		PlanSwift Enterprise — E	3080 🙁 pro
Corporate Accounts	Give a new license to Selected Branch		
Dashboard	Go Back to the Branch view		
Reports	You can give the customer a new license depending on what license pools have been created. If the cust then no new licenses can be made.	tomer has a license for each	available pool,
Branches		Pro Metric	
-		Advance Copy Pro	9.0
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	SAVE CANCEL		



### **Reallocating Seats**

If seats are available, they may be reallocated by clicking on the number of Seats number (Figure F-3). That opens the "Adjust Seats for 'Professional' window where seats can be added or removed. Click on the up/down arrows and enter the number of seats to be added or removed, and then click on the **ADD** or **REMOVE** button.

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			Adjust Seats for 'Pro Unassigned Seats: 52 Current Seats: 1 More seats		
				m location.	
				CANCEL	

Figure F-3

# **Downloading PlanSwift from Corporate Control**

Clicking on the blue Action **Gear** opens a drop-down menu (Figure F-4), which allows you to **Download** PlanSwift.

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					PlanSwift Ente	rprise — E3080 <b>PROFILE</b>
Corporate Accounts	Location C	-Enterprise Business Unit				
Dashboard	Temporary Override allows o	nses and seats authorized at this location. N ne seat per month to be available for a day, aber of days the software will stay active be	Used in cases where individuals	ses and seats from don't deactivate.	your available licer	ISOS.
Reports		,,,,,,,				
Branches	DETAILS USERS	LICENSES TRAINING				
						ADD NEW LICENSE
	Description	Туре	Expires •	Maintenance Expiration	Seats	Actions
	Software Licenses PlanSwift Professional 10.2	Trial	Jul 5, 2019	Jul 5, 2019	1	<b>~~~</b>
					$\rightarrow$	Download
						() 90 Set Reactivation Days
						Temporary Override

**Figure F-4** 

## Setting the Number of Days between Reactivations

The blue **Gear** drop-down menu in Figure F-4 allows you to set the number of days to when PlanSwift must be **Reactivated**. Simply enter a number between 1 and 90 to set the value.

#### **Temporary Override of Activations**

The blue **Gear** drop-down menu in Figure F-4 also allows you to click on **Temporary Override** to temporarily override a license deactivation if activation cannot occur. Temporary overrides are permitted only once per seat per month.

# Nuking (Resetting) Users

The **Nuke** option is used to deactivate a user's license. The **Nuke** option is available by selecting the **Branches** tab, then the **Branch Name** (Figure F-5).

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#### **Figure F-5**

Clicking on the **LICENSES** tab opens the license information for the **Owner Name** (Figure F-6). Clicking the down-arrow displays the licensing information as well as the **Nuke** option. Clicking on **Nuke** resets it with no further warning.

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	▼ Profession	al 10.2 License	Т	rial	Mar 6, 2020	Mar 6, 2020	1		•
		Activation Date	Computer Name	User Name	Expiration E	Date Activation	T		

**Figure F-6**