



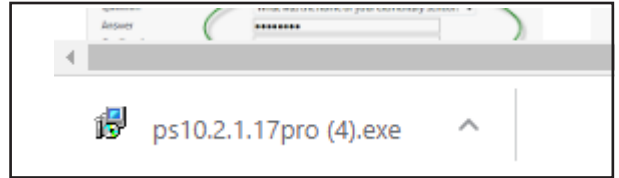
Quick Start Guide | Version 10

Updated on 1/16/2019

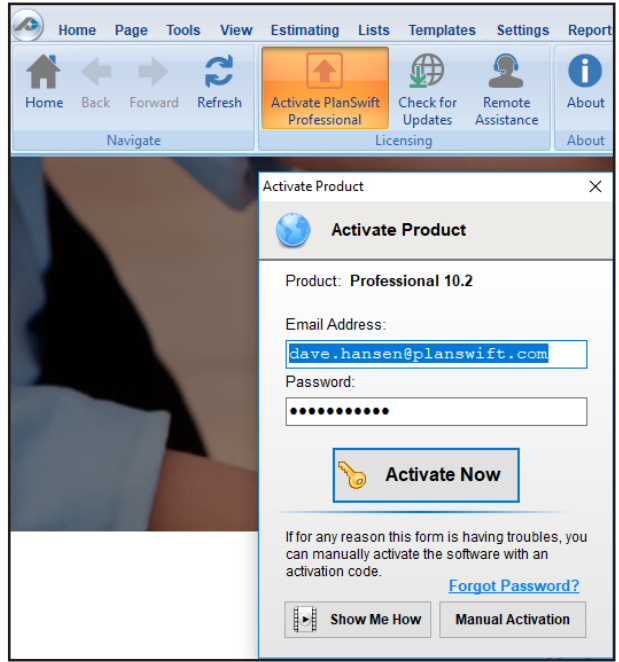
Authored by Dave Hansen & Aaron Watts

Install Guide

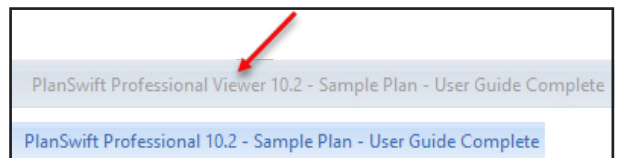
- Launch the **ps10.2.1.17pro.exe** and follow the prompts to install PlanSwift.



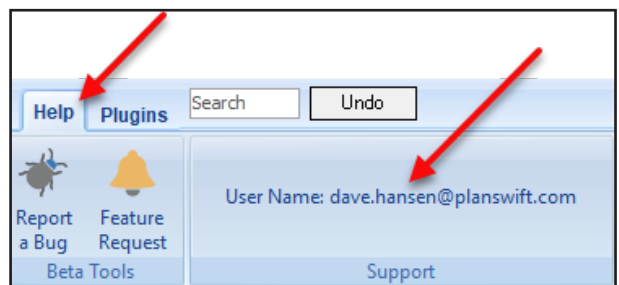
- PlanSwift software must be activated after it is installed. Clicking on **Help, then Activate PlanSwift Professional**, opens the **Activate Product Window**, where your **Email Address** and **Password** are entered.



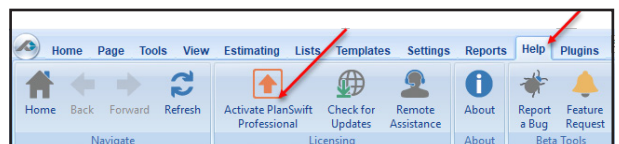
- If PlanSwift has not been activated, then "Viewer" appears in the title bar and only viewing of pages is allowed. An activated version has full functionality.



- Your User Name will appear in the **Support** group on the **Help** tab ribbon-bar menu.

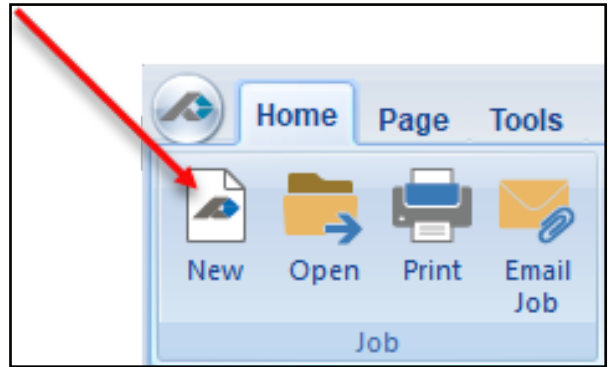


- Tools on the **Help** tab allow you to activate and deactivate PlanSwift, **Check for Updates**, obtain **Remote Assistance**, see the **Viewer** version number and your Computer ID (**About**), **Report a Bug**, and request a feature (**Feature Request**).

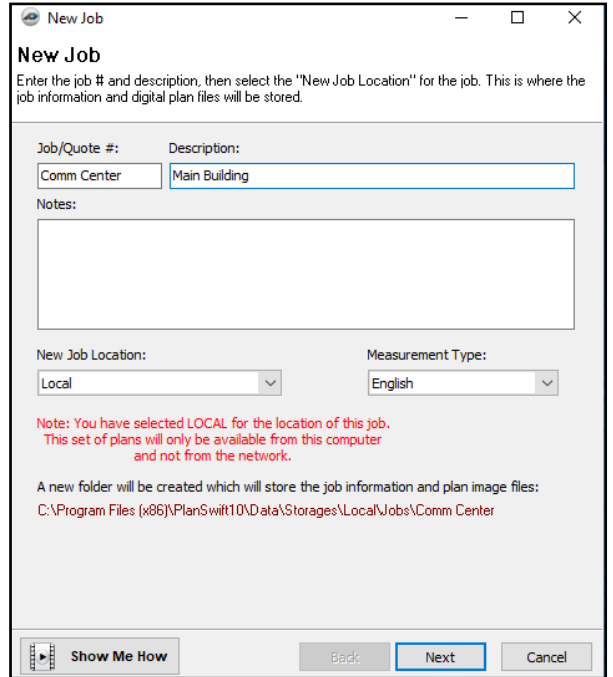


Creating a Job

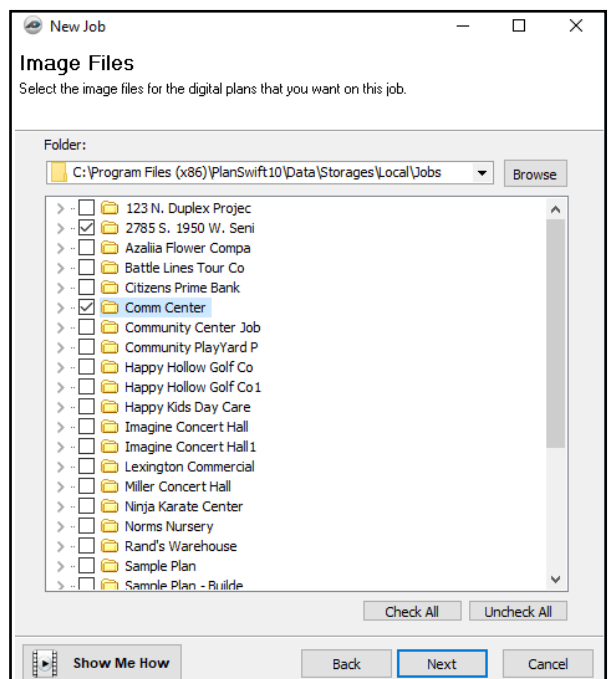
- The **New** button on the PlanSwift **Home** tab ribbon-bar menu starts a new job.



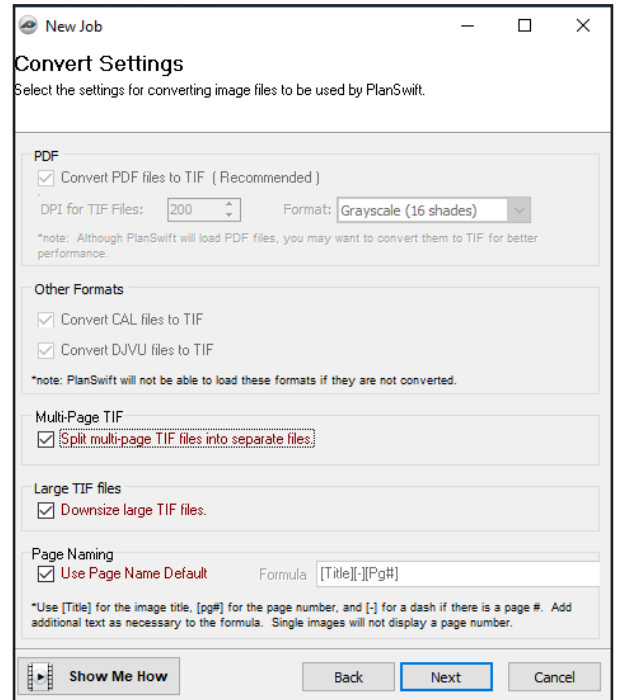
- The **New Job** window allows you to name and describe the job, add any notes, specify whether the job is to be stored on a local or a network drive, and specify whether measurements are to be in **English** or **Metric**.



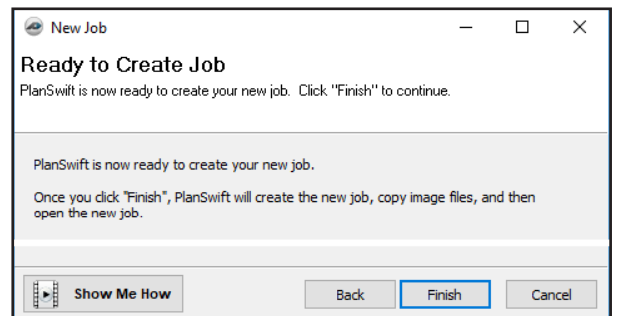
- The **Images Files** to be imported into the job are selected next. You can **Browse** if the files are not in the default directory.



- If you have specific conversion settings or page naming needs, the **Convert Settings** window allows you to set those up.



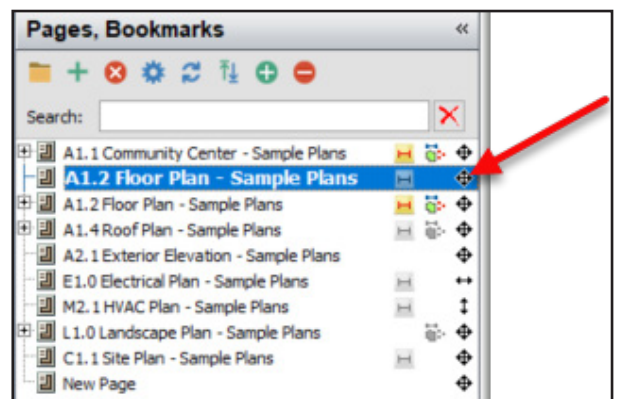
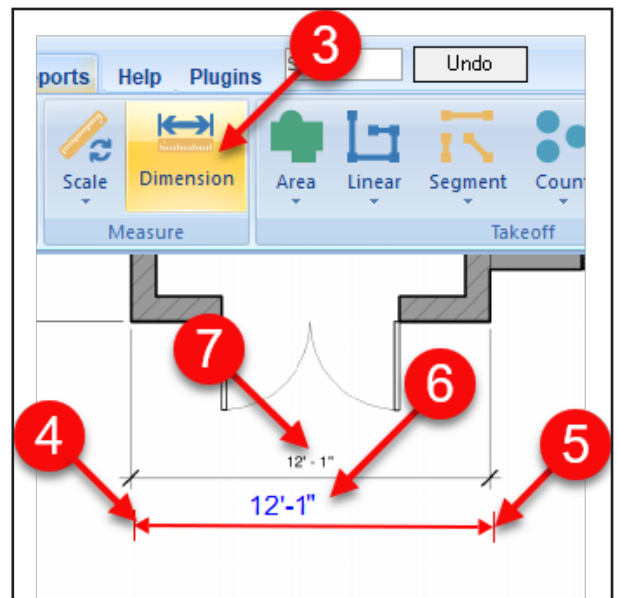
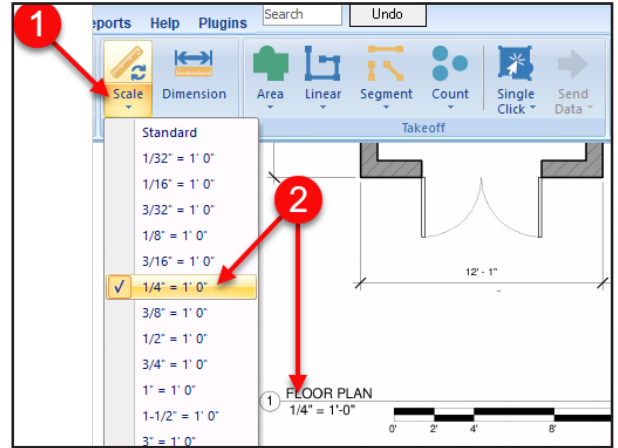
- You are now ready to create your job



Scaling

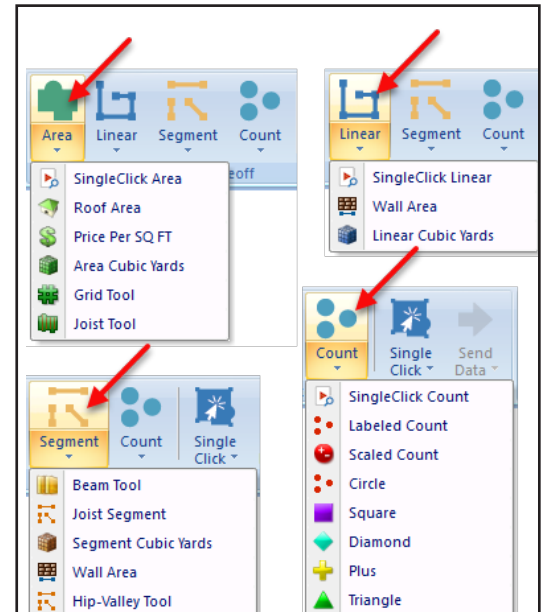
PlanSwift must know the correct scale for your plans before you can perform accurate takeoffs. Most plans will come with a scale, or you can manually calibrate one using a known dimension.

- Clicking on the drop-down half of the **Scale** button on the ribbon-bar menu allows you to set the scale automatically (#1).
- The scale you select should match the scale on the plan (#2).
- Use the **Dimension** button (#3) to verify the scale on both the x- and y-axes.
- Clicking on two **Points** (#4 and #5) places a dimension line and measurement between the two **Points** (#6).
- This dimension line should match the measurement on the drawing (#7). If this dimension measurement does not match the plan measurement, then the scaling is incorrect. Do this for both the X- and a Y-axes to verify that the scaling is accurate.
- You can verify whether a page has been scaled with the **Scale** indicator in the **Pages, Bookmarks** window. **Arrows** in both directions indicate both x- and y-axes have been scaled. If **Arrows** are only horizontal or vertical, then only the horizontal or vertical scaling has been performed.

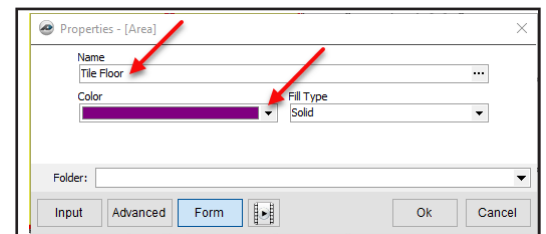


Performing Area, Linear, Segment, and Count Takeoffs

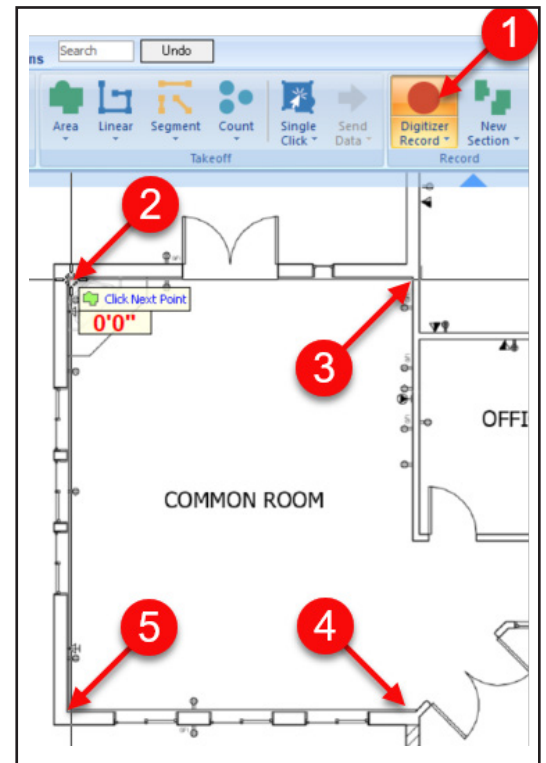
The **Area**, **Linear**, **Segment**, and **Count** takeoffs all work similarly. The top half of these buttons perform simple takeoffs. The drop-down halves perform more specific takeoffs. **Roof Area**, for instance, adds a third dimension (the slope) to a takeoff.



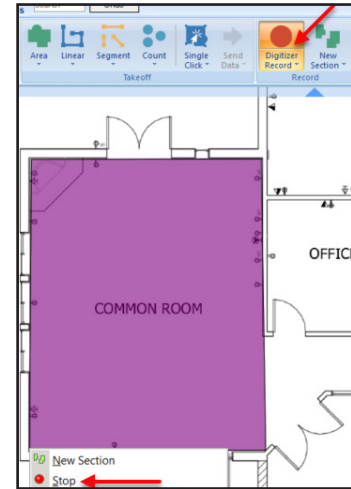
- Clicking on the **Area** takeoff tool opens the **Properties – [Area]** window where you give the takeoff a name (**Tile Floor**) and assign a **Color** and **Fill Type** to it.



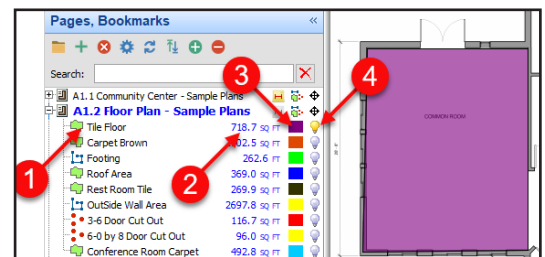
- After clicking on **Ok**, the **Digitizer Record** button (#1) turns on (transitions from green to red), indicating that you can begin the takeoff: clicking on the points at #2, #3, #4, and #5 in that order establishes the takeoff's boundaries. These points are recorded and then used to calculate the dimensions (area, linear, segment, or count), depending on the takeoff tool you selected.



- The takeoff recording is stopped by right-clicking after the last point and clicking on **Stop** from the right-click menu or by clicking on the red **Digitizer Record** button or by pressing **C** from the keyboard or by pressing the **ESC** key.

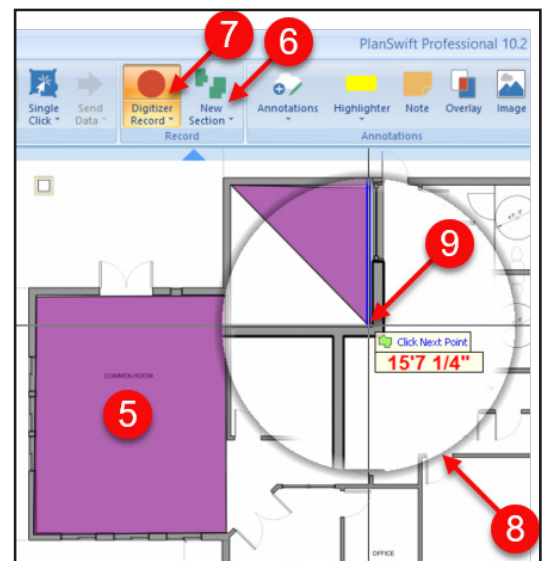


- The **Pages, Bookmarks** window shows the completed area takeoff's name (#1) **SQ FT** takeoff value (718.7) (#2), and the **Fill Color** (#3). Clicking on the yellow **Light Bulb** (#4) hides the takeoff (gray lightbulb) and redisplayes it when it is clicked again to toggle it back to yellow.

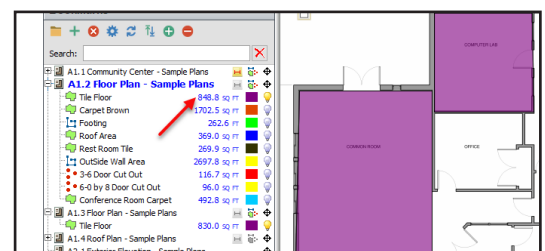


Adding a New Section to a Takeoff Using New Section

- Clicking on a takeoff to select it (#5), then clicking on **New Section** (#6), allows you to add a new section to an existing takeoff. This turns on **Digitizer Record** (#7) so you can click on the points for the new takeoff section.
- As you click on the points, pressing the **M** letter on the keyboard displays the magnifier (#8), allowing you to place takeoff points more accurately (#9).

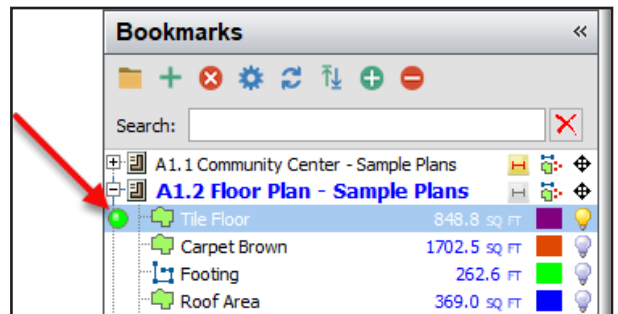


- The section added with **New Section** brings the total area of both sections to 848.8 SQ FT.

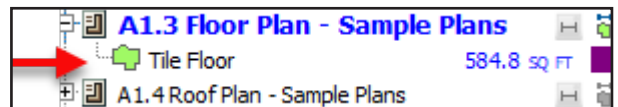


Adding a New Section to a Takeoff on a Different Page Using Continue With

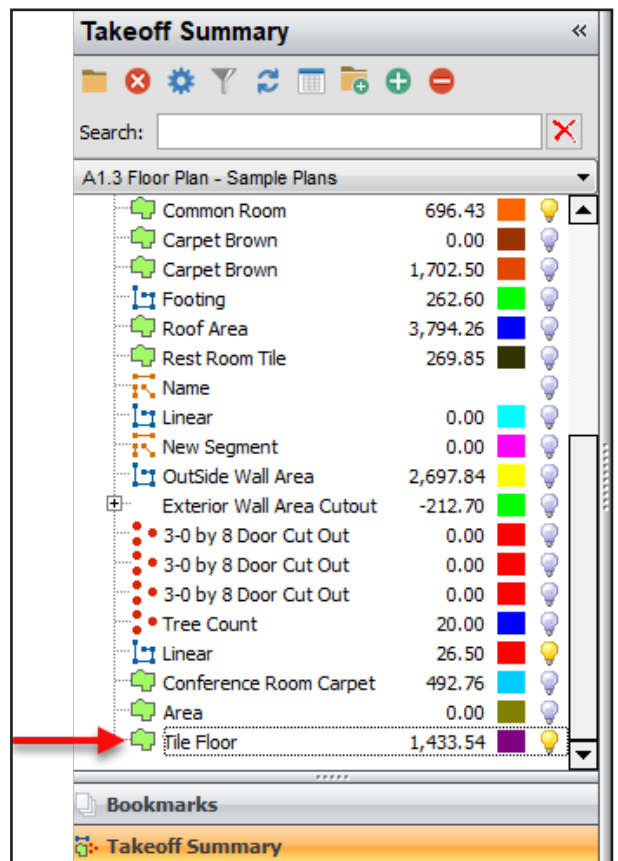
- An alternate way of creating a **New Section** is with the **Continue With** tool. It allows you to add a new section on a different page.



- To use the **Continue With** tool, go to the page where you want to perform a takeoff, hover over a takeoff item in the **Pages, Bookmarks** window, click on the green button that appears to the left of the takeoff item, and then perform the takeoff.

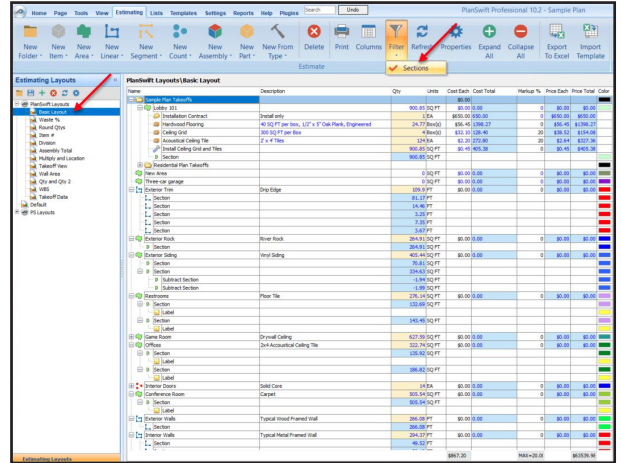


- PlanSwift adds up the values of all new sections, even when they're on other pages, into one total in the sidebar **Takeoff Summary** area (the Tile Floor takeoffs are 848.8 SQ FT on Floor A1.2, plus 584.8 SQ FT on floor A1.3 = 1,433.54 SQ FT total).



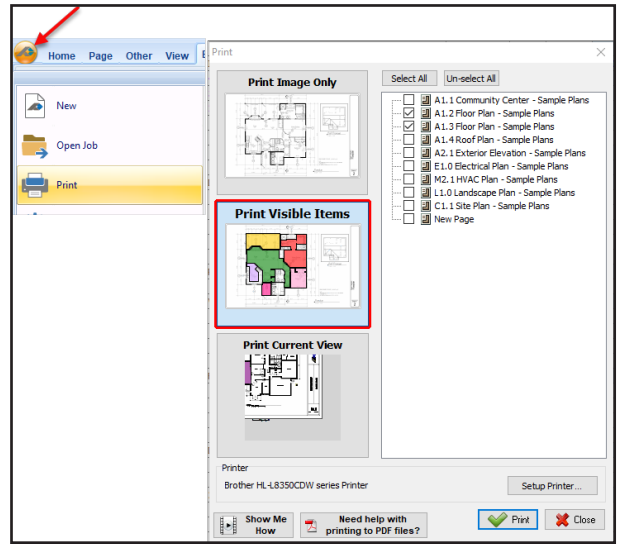
Estimating Tab

- The Estimating tab provides a summary of takeoffs for the current job. The takeoffs are displayed in a grid, which is called a layout. Layouts can be modified by adding or removing columns and by deleting a takeoff, which removes a row. Takeoff totals appear at the bottom of the layout. Layouts may be filtered by Sections, can be printed, and can be exported to Excel.



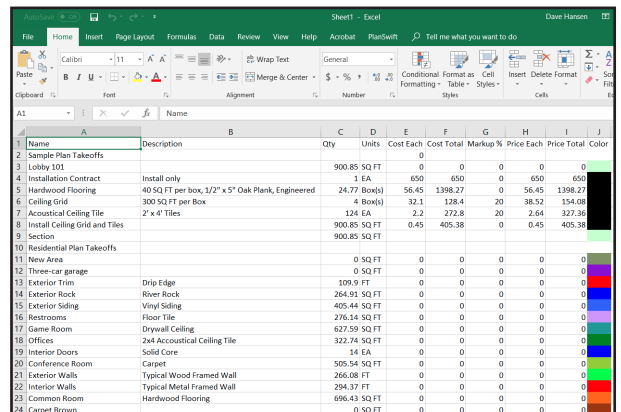
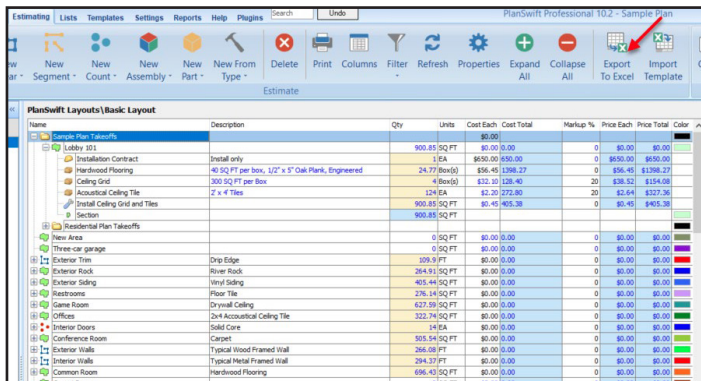
Printing

- Clicking on the PlanSwift logo allows you to specify pages to be printed. You can select Print Image Only, Print Visible Items, or Print Current View.



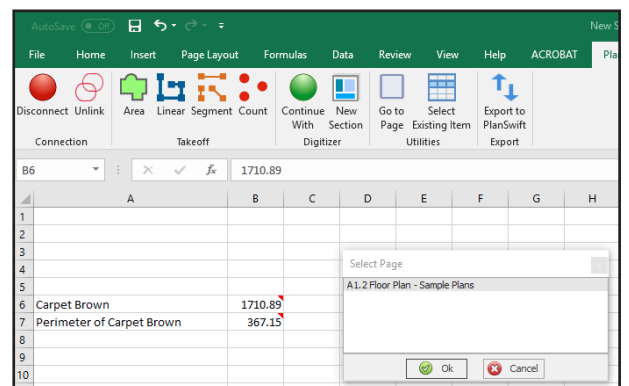
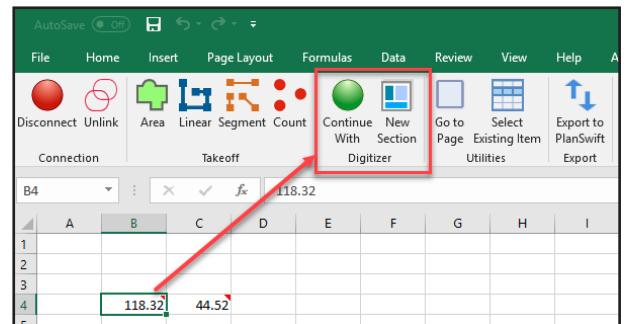
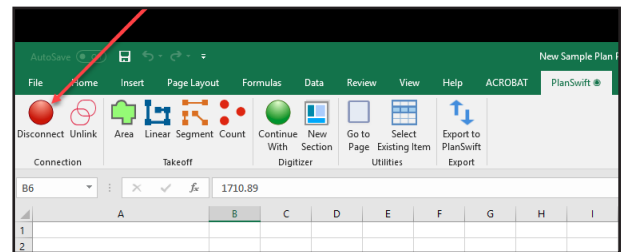
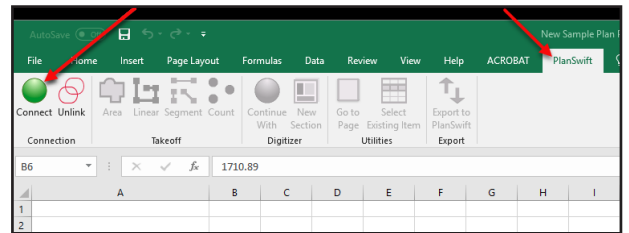
Exporting to Excel

- Clicking on Export to Excel automatically exports the displayed data to an Excel spreadsheet.



Integration with Excel

- PlanSwift's Integration with Excel provides the ability to live-link to and update Excel WorkBooks in real-time. After opening PlanSwift and the job that you want to link to the Excel worksheet, then opening the Excel spreadsheet you want to link to, you can click on the **PlanSwift** ribbon-bar tab in Excel. To complete the link, click on the **Connect** (green button), which then transitions to a red **Disconnect** button.
- Takeoffs can now be initiated using the **Area, Linear, Segment, and Count** tools from **PlanSwift** ribbon-bar tab in Excel, and the updated values from the takeoffs are immediately live-linked to the Excel worksheet.
- The **Continue With** and **New Section** tools are also available.
- Clicking on a takeoff value in the worksheet, then clicking on **Go to Page**, jumps to where that takeoff value is in PlanSwift. To disconnect from a worksheet, click on the red **Disconnect** button. To unlink the spreadsheet, click on **Unlink**. See the PlanSwift Pro User Guide Version 10 for even more capabilities in PlanSwift's Integration with Excel



Where Do I Go from Here?

Support Options Include:

■ **PlanSwift Pro User Guide**

- **The PlanSwift Pro User Guide** is an excellent place to start in learning to use the tools and features found in PlanSwift. It has four sections:

1. Managing jobs and pages, creating takeoffs and annotations, using shortcuts and hotkeys, and integrating with Excel.
2. Customizing PlanSwift using templates, parts, and assemblies, estimating, creating reports, installing plugins, and using some advanced features.
3. Managing PlanSwift licenses and activations.
4. FAQ to answer commonly asked questions.

■ **PlanSwift Plugin Store**

- PlanSwift is designed to be expandable through the addition of plugins, which allow you to quickly and easily customize your PlanSwift platform and differentiate yourself from your competition. Plugins enhance the capability of PlanSwift's core utility. Some plugins are applications, and some contain a large library of prebuilt templates, parts, and assemblies, which can be customized to a user's specific needs. Others are a combination. Each plugin comes with its own documentation.

■ **PlanSwift Pro YouTube Channel**

- PlanSwift's YouTube channel has numerous videos explaining how to perform takeoffs and do estimating.

■ **PlanSwift Webinar Page**

- PlanSwift provides free webinars to teach the basics of PlanSwift. One covers fundamentals, and the other covers Parts and Assemblies. Each of these are taught twice a week, and you can repeat them as often as you like.

■ **PlanSwift Training Page**

- PlanSwift's more advanced estimating and reporting features may also be able to benefit you. These are not covered in the User Guide. We highly recommend new users purchase a training package because training is customized to each user. We offer both one-on-one training and classroom training. Contact training@PlanSwift.com or at 1-888-752-6794 Ext. 4.