

PlanSwift

Day 1

My Account (Customer Portal)

- Navigate the [My Account Portal](#)

License Activation

- [Activate/deactivate licenses](#) (PlanSwift and Plugins)

Create a New Job

- Bring a [new job](#) in to PlanSwift
- [Switch between existing jobs](#)
- Delete jobs out of PlanSwift

Edit Pages

- [Rename pages](#)
- [Page Tab](#)
- Add/Delete Pages
- Organize pages

Navigate the Workspace

- [Navigate the pages](#)
- [Open pages in new tab](#)
- Undock pages
- [Bookmarks](#)

Tabs and Panels

- [Description of each tab](#)
- Undock tabs
- Description of the panels
- Move/Undock panels

Organize Takeoff

- [Organize takeoff into folders](#)

Scale

- [Auto/Manual Scale](#)
- [Check dimensions](#)

PlanSwift

Basic Takeoff

- [Area](#), [Linear](#), [Segment](#), and [Count](#) tools
- Discuss other takeoff tools available
- Add new sections of takeoff
- Copy/Paste takeoff
- Edit sections of takeoff
- [Ortho, Snap](#)
- [Record mode](#)
- [Arc tool](#)

Annotations

- Markups
 - [Arrows](#), [Box](#), [Pen](#)
- [Highlighter](#)
- [Note](#)
- [Image](#)
- Annotations
 - [Revisions Clouds](#), [Stamps](#), [Sticky Tabs](#)
- [Overlay](#)

View Tab

- Show/Hide options
- Adjustments for labels, dimensions, and notes

Tools Tab

- Rotate takeoff
- [Zip Swift Job](#)

Sharing Job Information

- [Show legend on page](#)
- [Print Options](#)
- [Save as PDF](#)
- [Email Options](#)

Study Hall

Day 2

Day 1 Review

- Q & A

Estimating

- Layouts
- [Columns](#)
- [Expand and Collapse All](#)
- [Exporting to Excel](#)
- Folders
- [Adjust Arrows](#)
- Print

Build as you go Parts

- [New Part/Material](#)
- [Drag and Drop Material Parts](#)
- Add Cost for Material

Templates Tab

- Sample Templates
- [Create a New Tab](#)
- Save Build as you Go Assemblies as a Template
- Create Custom Templates
- How to use the Assemblies saved in Templates
- [Export Templates for Sharing/Backup](#)

Basic Reports

- [Report Layouts](#)
- [Basic Customize Reports](#)
- Address Book
- [Report Designer](#)
 - Add Logo
 - Add Text Box
- Print/Export

Back up and Share

- Export Tab
- [New Data Storage Location](#)
- Export Plugin Package

Study Hall