

# **planup**

## **Core Logic (eTech) User Guide**



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# PlanUp via Smart Survey

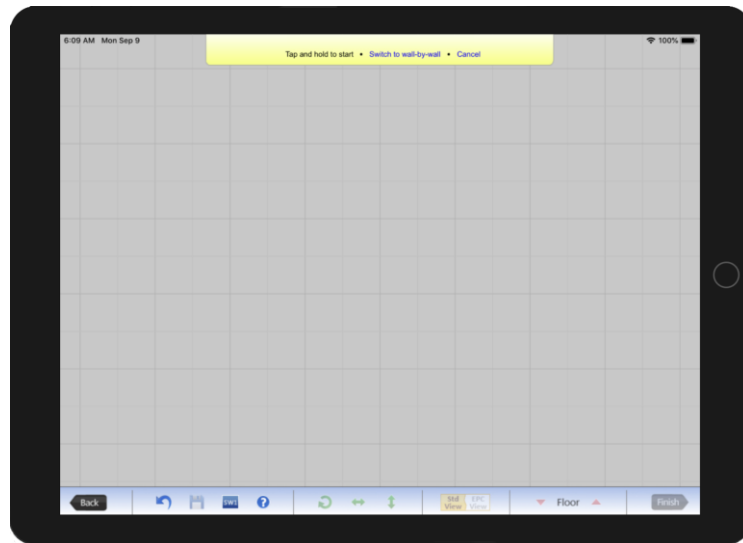
eTech and PlanUp have now integrated for use on the iPad – EPC details recorded in PlanUp will be imported into Smart Survey to help speed completion of the survey.

This guide aims to show you how to transition between apps and how to access the plans after the survey is complete.

## Starting and Editing a Floorplan

To access PlanUp, first start the survey as normal from Smart Survey.

The first time you access the floor plan option for a survey in Smart Survey you will be taken to this screen:



From here you can start to draw the floorplan. Please see our main user guide found at the link below for help with drawing the floorplan and recording EPC data.

<http://www.planup.co.uk/help/default.aspx>

**IMPORTANT:** Unless you want to restart the floor plan, please ensure you choose the edit floorplan option and do not create a new floor plan – if you choose the start new floorplan option this will delete all information in PlanUp and you will have to start from scratch.

All address information is passed from Smart Survey to PlanUp so you never have to re-enter address information.

To return to Smart Survey simply tap on *Finish* in the bottom toolbar.

**IMPORTANT:** You need to hit Finish to save the plan, even if it's not finished and you wish to continue with it later. If you hit 'Back', this will cancel whatever you have drawn.

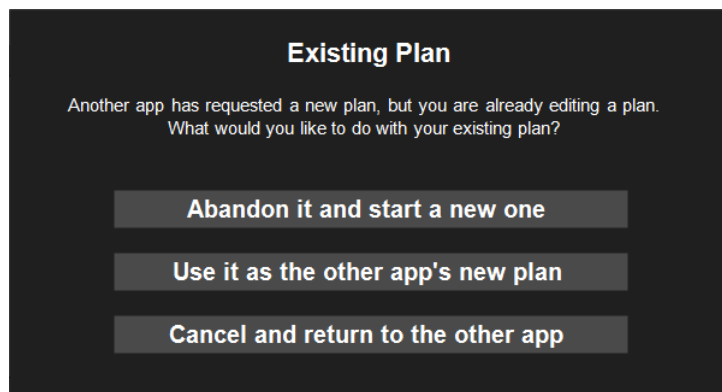
All EPC information recorded in PlanUp will be passed back to Smart Survey when you return to it.

You can edit the plan using the floorplan button again to continue where you left off.

**IMPORTANT:**

- Please ensure that if you have been working in PlanUp separately that you save and finish what you are working on before you access Smart Survey.

- If you try to start a plan from a survey and PlanUp is already open with a plan being edited you will see the following screen:



- *Abandon it and start a new one*: this option will start a new plan from scratch – anything in the plan open that has not been saved will be lost
- *Use it as the other app's new plan*: this option will leave the plan as it is so it can be used with in Smart Survey allowing you to continue where you left off

*Cancel and return to the other app*: this option will return you to Smart Survey without doing anything to the plan open in PlanUp – you can now go back to PlanUp, save the plan as you need to and then return to Smart Survey to begin the new plan for the survey

# Using EPC Functionality

Everything listed below recorded for the EPC in PlanUp will be sent to Smart Survey at the point of returning to the survey.

## EPC Symbols

Items such as programmers, loft hatches, boiler flues and so on can be added to the plans. A specific menu for EPC only symbols is available on the top tool bar.

These symbols will only show on the EPC plans and not on the marketing plans used by estate agents.

## Item Specific Data

Certain standard items can have EPC information recorded about them – windows, doors, fireplaces, radiators, showers, and baths.

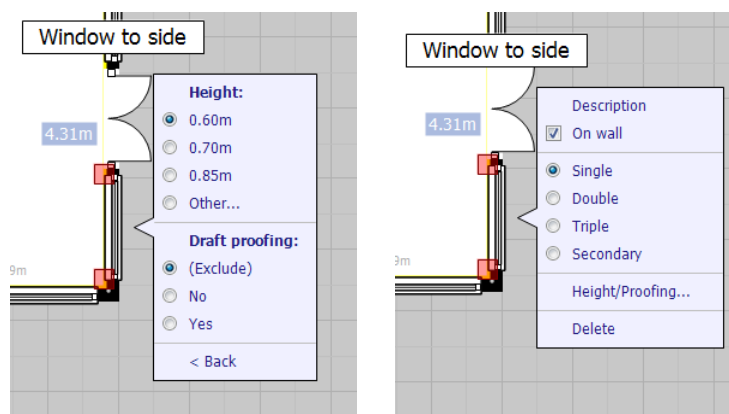
### Windows

All windows have the option to record:

- The glazing type.
- The height.
- The draft proofing.

To do this:

- Tap on the window to bring up the pop-up menu.
- The main menu for windows contains the glazing options – select as appropriate.
- To access the height/draft proofing menu tap on *Height/Proofing...*
- You will see some standard heights available with the option to add different ones as may be required.



The width of the window will be used as it is drawn together with the height to calculate the window area and make adjustments to alternative walls as appropriate.

Please note that glazing areas for non-separated conservatories are treated differently. Please see [Non-Separated Conservatories](#) for more details.

## Doors

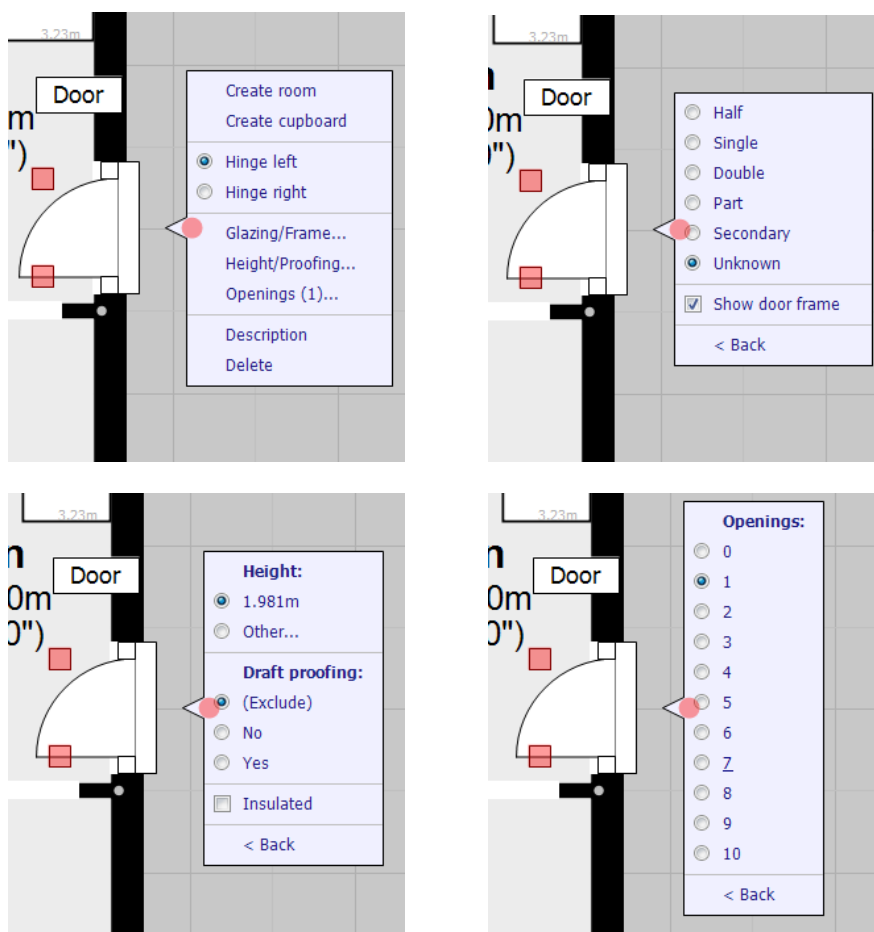
Any doors (except garage doors) have an option to record:

- The glazing type.
- The height.
- The draft proofing.
- The number of openings.

To do this, tap on the door to bring up the pop-up menu. You will see on the menu options for:

- *Glazing/Frame.*
- *Height/Proofing.*
- *Openings.*

The menu will update accordingly giving you the options to record what you wish. Below in order: main menu, glazing, height/proofing, and openings menus.

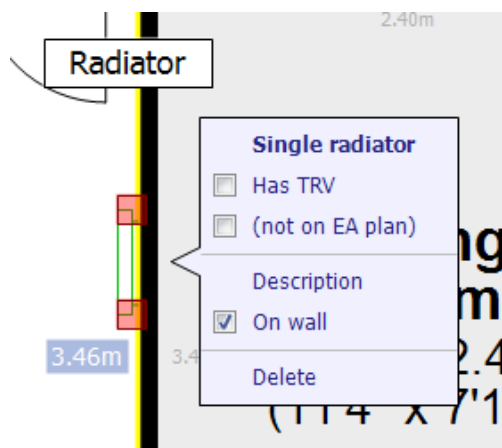


The width of the door will be used as it is drawn together with the height to calculate the window area and make adjustments to alternative walls as appropriate.

## Radiators and other heaters

Radiators, storage heaters, etc will be counted (each counted separately) and the totals available in the EPC report. The number of radiators with TRVs is also counted. TRVs can be marked by tapping on the radiator and marking the option in the pop-up menu.

It is also possible to mark the radiators for use on the estate agent plan or not.

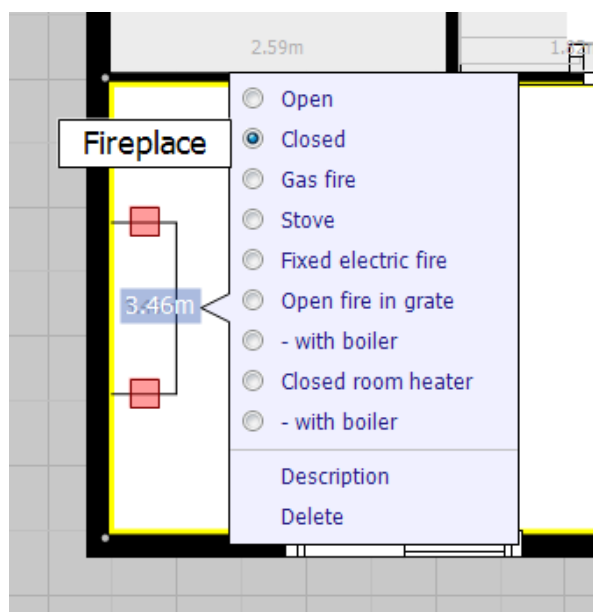


The radiator and other heater options available are:

- Single/double radiator.
- Storage heater.
- Warm air vent.
- Heated Towel Rail.
- Electric Heater.
- Water/oiled filled radiator.

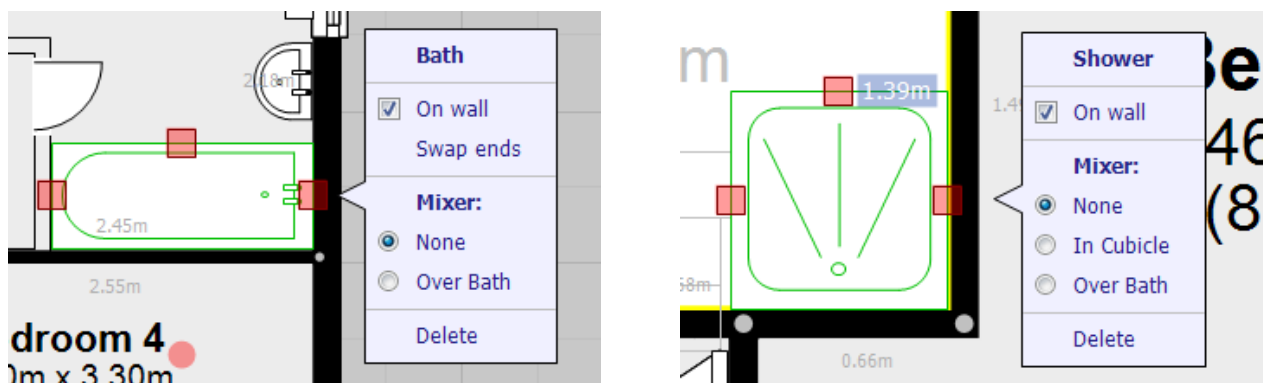
## Fireplaces

Once a fireplace has been added you can choose the type of fire/heater it is from the pop-up menu:



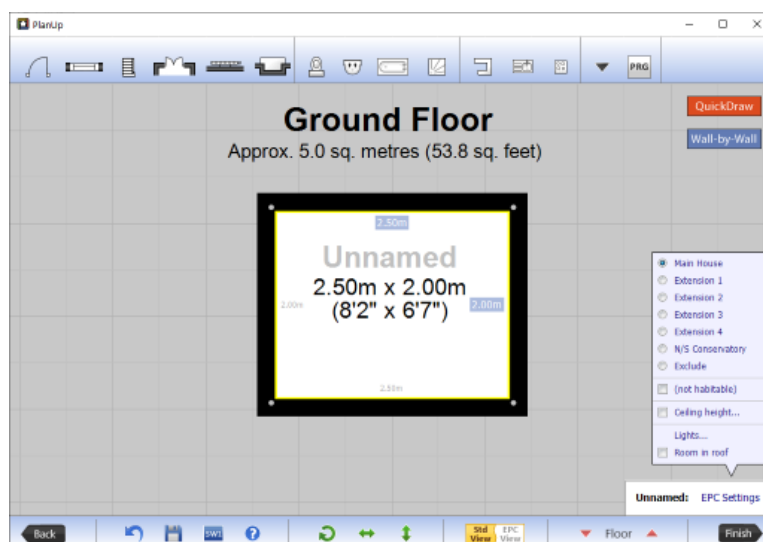
## Baths and Showers

For baths and showers it is possible to record mixers. To do this simply select the bath/shower once it has been added to show the pop-up menu and there will be options visible to record mixer.



## Room Specific EPC Data

While you have any named room selected there will be an *EPC Settings* menu available – this allows you to record the EPC data specific to that room. Tap on EPC Settings to show the menu indicated below:



From this menu you can:

- Record whether the room is:
  - Part of the main house.
  - Part of an extension – up to 4 separate extensions can be noted.
  - A non-separated conservatory – please see [Heat Loss and Construction](#) for how to set glazed perimeter details. This is a heat loss type.
  - To be excluded from the EPC.
- If the room is habitable or not.
  - If you name the room first, this will default to habitable in appropriate circumstances e.g. if the room is titled as lounge – this automatic choice can be overridden.
  - If the room is habitable you can indicate if it is heated or not.



- Measure the ceiling height.
  - Tapping this will open the number pad to enter the ceiling height.
  - Different rooms can have different ceiling heights.
  - If there are multiple ceiling heights a list of currently entered ceiling heights will be available to choose from.
  - Newly created rooms will be marked as the same height as the room they were created from by default.
- The number of lights – a count of both normal and low energy bulbs is available.
- If the room is a room in the roof.

## Heat Loss and Construction Details

The best way to record these details is using the EPC view of the plan. You get to the EPC view by tapping on this button in the bottom toolbar:



When in EPC view the button colours will swap the other way around to those shown above and the plan view will change to look something like this:

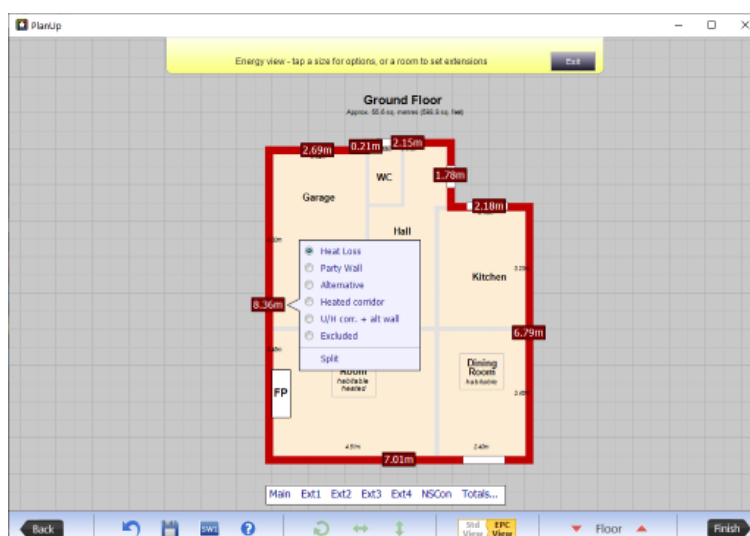


## Heat Loss

The default heat loss type is for HLP. To record other heat loss types:

- Tap on the wall measurement in the red box.
- This will give you option to choose from a selection of different heat loss types.
- The heat loss type will automatically run along the length of the wall unless part of this wall is part of an extension.

**NB:** Different heat loss types will be displayed in different colours.



## Can I Split a Wall Into Two Heat Loss Types?

Yes. Whilst in the EPC view:

- Tap on the wall measurement that has two heat loss types.
- At the bottom of the pop-up menu there is an option to *Split* – tap on this.
- The wall has now split into two equal parts.
- You can now tap on one of these measurements to change where the split is as required.
- Tapping on the measurements will also allow you to choose a different heat loss type for that section only.

Heat loss can also be recorded by tapping on an external wall whilst editing the plan normally and tapping on *Heat loss*.

**NB:** You cannot split the heat loss types unless you use the method in the EPC view.

## Non-Separated Conservatories – Glazed Perimeter

If a room is marked as a non-separated conservatory you can select the heat loss type as glazed perimeter – this is only available for non-separated conservatories.

## Alternative Walls

Any walls that are marked as alternative will have a wall area calculated. These areas will exclude any doors and windows added to the alternative walls. Please ensure the heights of these items have been added correctly to ensure correct calculations. Please see [Item Specific Data](#) for details.

**IMPORTANT:** You must have a ceiling height recorded for the alternative wall area to be calculated. See [Room Specific EPC Data](#) for more information on ceiling heights.

If you select the heat loss type as alternative you can record a different construction for the alternative wall types.

Calculations for alternative wall areas are shown on the final EPC report.

## Construction and Insulation

You are able to record one construction type for part of the plan – main, and extensions 1-4. To do this:

- From the EPC view tap on the options at the bottom of the screen for Main, Ext1, etc.
- This will display the floor area for that part of the plan with the ceiling height and heat loss total.

- At the right hand end of this it will say *Construction* – tap on this.
- You can now choose from the different types of construction and insulation available.
- Tap on *OK* when done.

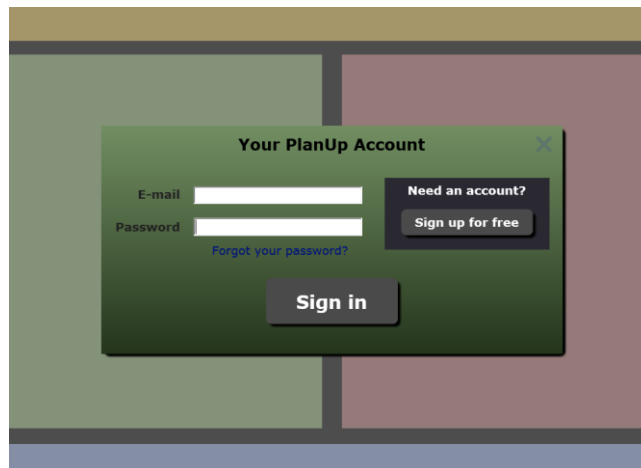
You can also record the construction from the normal view by tapping on an external wall and selecting *Construction* from the pop-up menu.

# Uploading Floorplans

The floorplans are uploaded through the Smart Survey app. For information about how to start the upload of the plans please contact eTech support.

## Log in to PlanUp

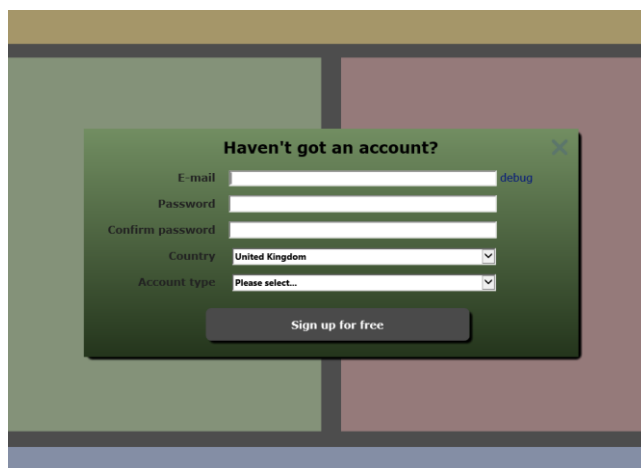
Once the plan has been uploaded you will be prompted to log in to PlanUp. If you are not already logged in to PlanUp, the first thing you'll see is the log in screen:



If you already have a log in please do so with your normal details if you are not already logged in..

If you do not already have a log in please tap on *Sign up for free*.

You will now see the following screen:



Please fill in all of the fields.

**IMPORTANT:** Please ensure you select *Domestic Energy Assessor* for the account type.

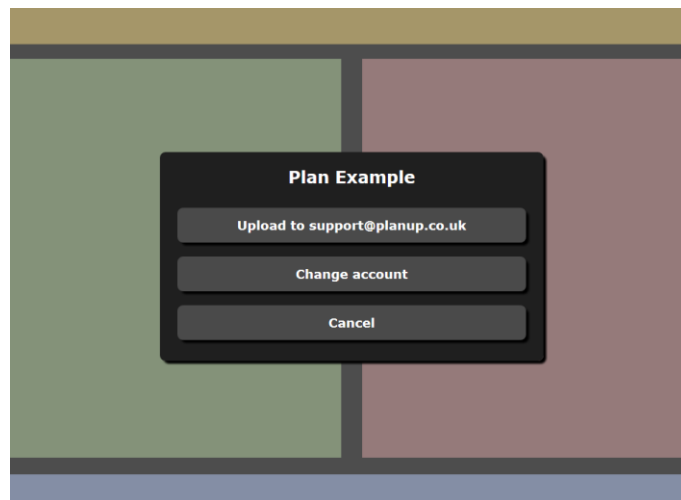
Once you have clicked on *Sign up for free* you will be sent an activation link to the email you entered to sign up with. When this arrives please click on the link and fill in the contact information asked for.

You can now log in to PlanUp.

Please note that unless you need to change the account you are logging in with you should never need to log in of PlanUp again with the possible exception of after upgrading the app. PlanUp will remember your log in details.

## Attaching Plan to Account

Once you have logged in you will see the following screen:



If you are logged in to the account you want the plans to be added to, simply tap on the *Upload to...* button.

If you use more than one account and want to attach it to a different account tap on *Change account*. This will take you to the log in screen so you can log in with the different details.

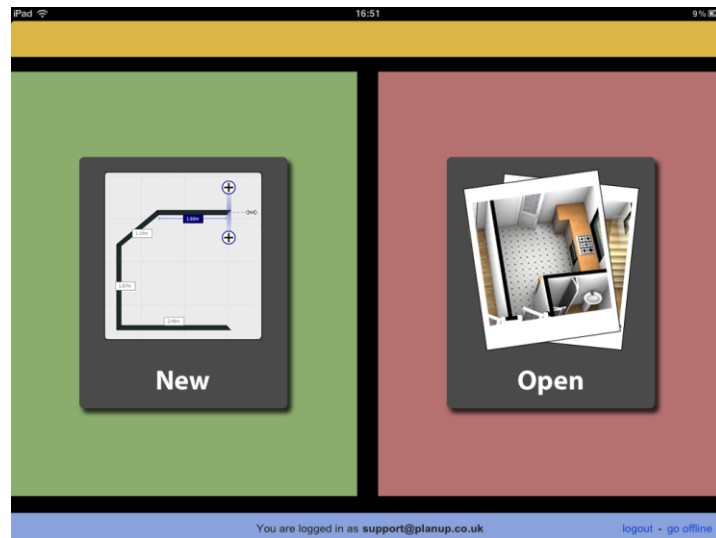
# Marketing Floorplan for Clients

Once a floorplan has been uploaded you can make final alterations if necessary before sending the images to your client.

To do this, run PlanUp directly on your iPad i.e. not from Smart Survey. You can also run PlanUp on your desktop PC – this can be installed from:

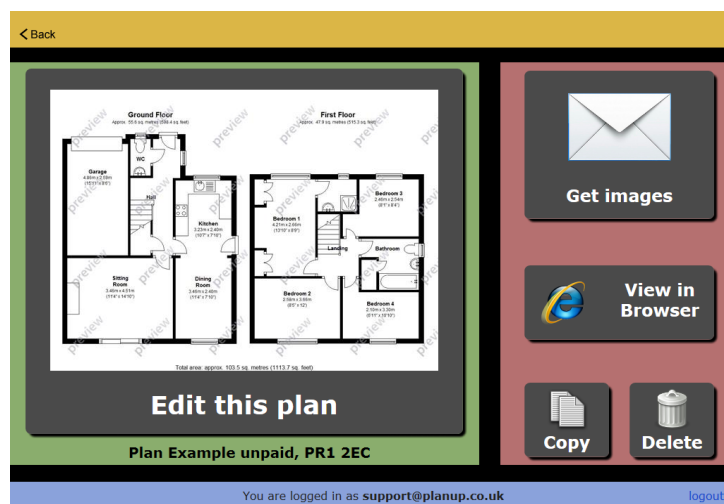
<http://www.planup.co.uk/download.aspx>

You will see the following screen:



Tap on open and select the relevant plan from the list.

You will now see the following screen:



From here you can:

- *Edit this plan* – tapping this allows you to edit the plan.
- [Get images](#) – tapping this will allow you to request the images attached to an email together with links for descriptions/reports that may be required. Please see [How to Get Images](#) below for more information.
- *View in Browser* – this opens an online viewer.

- *Copy* – opens the plan so you can save a copy as a different address should you have another very similar plan.
- *Delete* – tapping this removes the plan from your list in PlanUp.

If you want to change the details on the plan in any way click on *Edit this plan* to enter the editing screen.

To make any customisations to the plan e.g. changing the font, colours, adding shadows etc click on *Get images* to start requesting them. The preview watermark can be removed during this process.

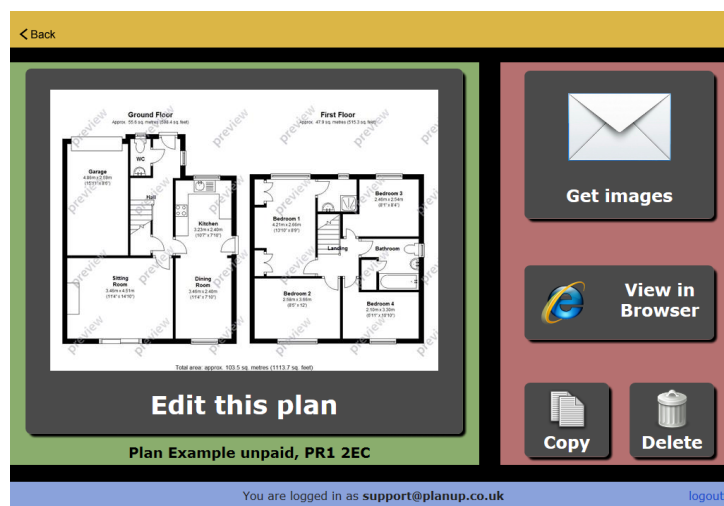
Details of how to customise plans can be found in our main user guide, available from the link below:

<http://www.planup.co.uk/help/default.aspx>

If your client would rather set the customisations themselves then you can send a link to the client so that they can access all of the customisations themselves.

## Removing the Watermark

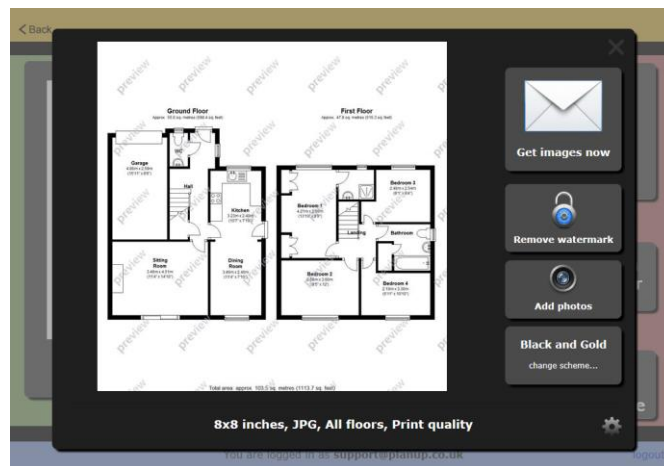
To remove the preview watermark, select the plan you want to work with to get to this screen:



Now tap on *Get images*:

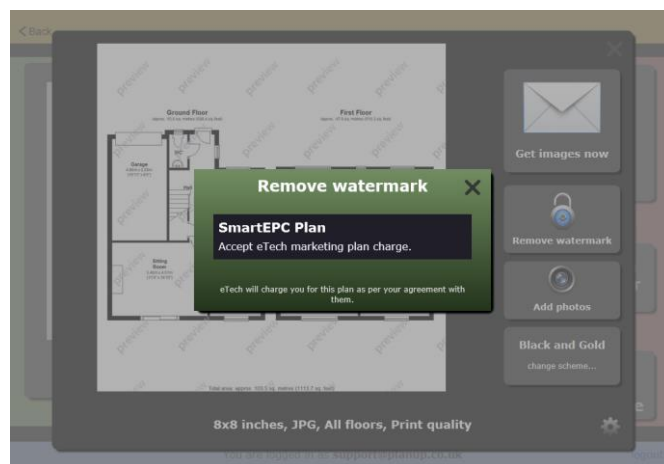


Now tap on the 2D option. On the following screen is a *Remove watermark* option – tap on this.



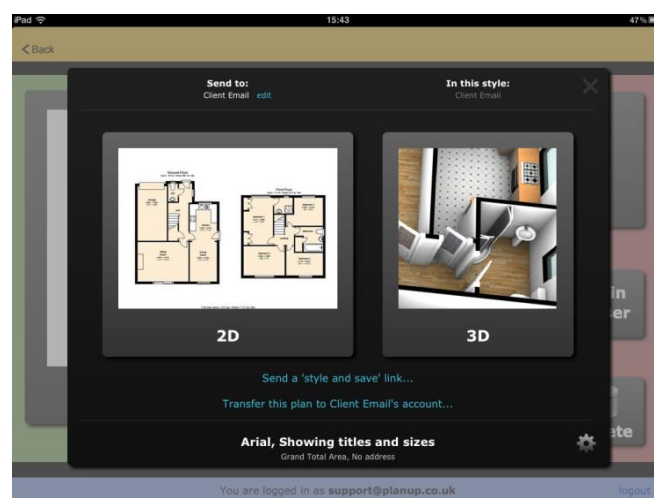
Please note: You can also remove the watermark while requesting the 3D plan – you will need to generate the 3D plan before you can remove the watermark.

You will now see a message asking you to accept the eTech marketing plan charge – you will be charged by eTech as per your agreement.



## How to Get Images and Other Files

To obtain the images and any reports/descriptions generated whilst drawing the plan tap on *Get images*. You will now see the following screen:



If you want to send the marketing images to a client there are different options according to how you want to do this. First of all it is always worth setting where the image is going to.



## Choose Where To Send Images To

By default your final images will be sent to the email address you log in with if you are requesting via email. If you want them to go somewhere else, choose where you want to send the images by using the *Send to* drop down towards the top left.

You can set up an alternative office email address or add a customer email address.

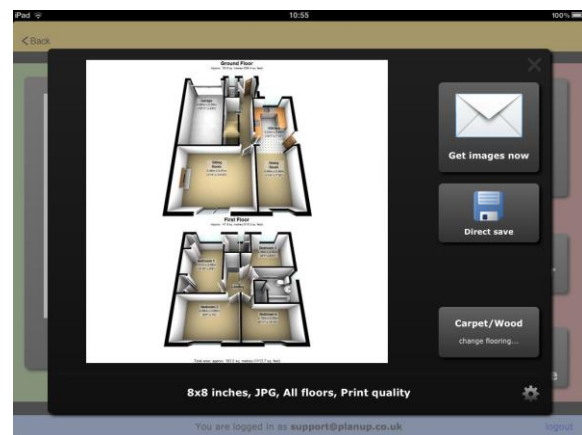
Once you have entered and saved the email address a new own style record will be saved for the client.

**NB:** When sending to You or Your office the default style is Your own style. You can also choose to send the plans in any style you have saved e.g. for customers. Simply select to send to You or Your office and choose a different style from the In this style drop down list. This also allows you to save further independent styles.

You can also add styles for your clients without adding an email address. Simply tap on the In this style option and you will be given a drop down list to add styles to.

## Send or Save Files To Send On To Your Client

Customise the plans as you wish them to look for your client. For 3D plans you will need to prepare the plans if you intend to save them and send them in an email of your own.



Once you have completed all customisations/3D preparation you can either:

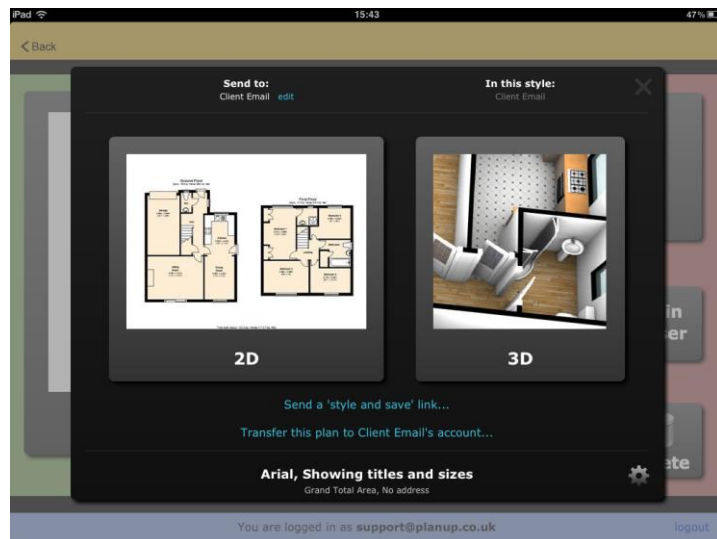
- Tap on *Get images now*: This will send an email to the email you selected in [Choose Where To Send Images To](#) and send a copy to the email address you used to log in to PlanUp.
- Tap on *Direct Save*: This will give you a series of links to save the image(s) from and also any additional files that may be required e.g. document containing any marketing descriptions you may have recorded.

## Allow Client to Customise and Save Plans

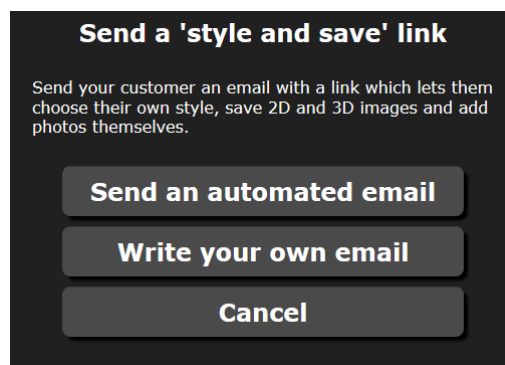
You may also wish to send you client a link so that they can access the plan to set their own customisations.

To do this:

- Set up your client's email address as a customer email.
- Once you have chosen the send to as a customer email address two new links will appear towards the bottom of the screen:



- Tap on *Send a 'style and save' link...* to send a link to your client. The following message will appear:

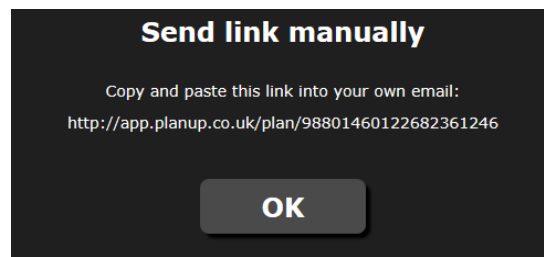


- To send the *Style and Save* link you can either:
  - Tap *Send an automated email* to confirm and send the email to the email address you entered. Your client will then receive an email similar to the following:



Or;

- Tap *Send you own email*. You will now be shown the link (similar to below) which you can copy and send in an email of your own devising.



- Your client then clicks on the link in the email they receive – they do not need to log in. From the page that opens they can customise the plan in the same way that you can after clicking finish.
- Images and other outputs are also saved in the same way i.e. requesting images to be sent via email or saving directly.

A user guide for recipients of this link can be found here:

<http://forums.planup.co.uk/forum/default.aspx?g=posts&m=750&#post750>

## FAQs

### How do I update PlanUp?

Any updates for PlanUp will be available from the App Store – if no updates are showing as available you are already up to date.

### What Happens if PlanUp Crashes?

Here at PlanUp we pride ourselves on the reliability of the software and the safeguards in place should PlanUp crash.

On the odd occasion PlanUp crashes, you should re-open PlanUp and the plan will re-open exactly as it was before the crash.

However, on the rare occasion that this does not happen, you can recover the plans yourself from the auto-saves without having to contact us first.

This can also be used if you are using PlanUp via another app to recover plans where the other app can no longer find the plan drawn.

**IMPORTANT:** Auto-saves are only kept on the iPad for 2 weeks. After this time they are automatically deleted and cannot be recovered.

### How Do I Find a Lost Plan?

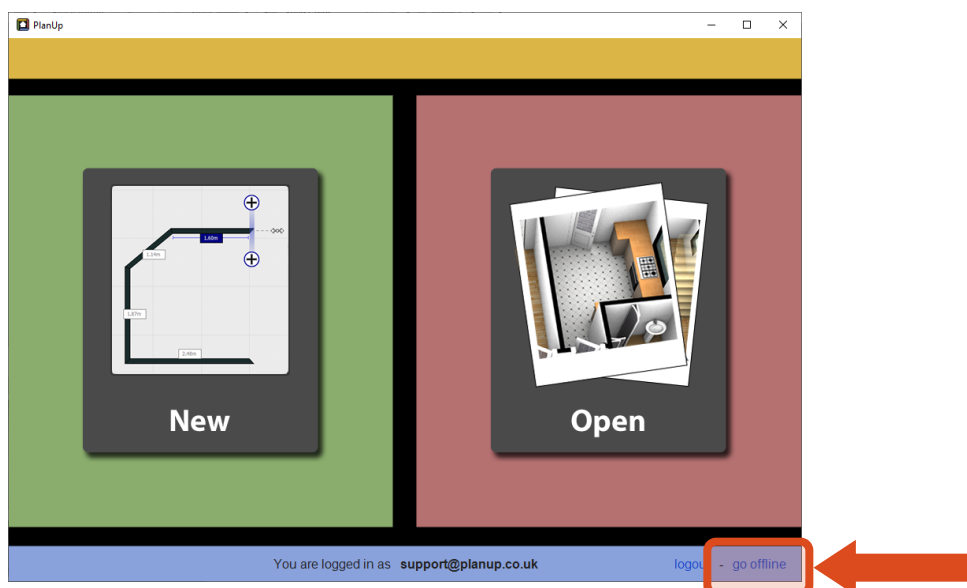
If you do lose a plan (either PlanUp crashes and does not re-open with the plan, or Smart Survey cannot find the plan) it does not matter if you are/were online or offline when working on the plan. All that matters is that you are using the same device that the plan was drawn on.

**NB:** All screenshots below are from a Windows PC. The PlanUp screens are identical regardless of the type of device that you are using apart from any surrounding border that is put on by the operating system.

#### Step 1: Open PlanUp and Go Offline

Open PlanUp directly on the device that you used to draw the plan – do not via Smart Survey.

You will now see a screen similar to that below:

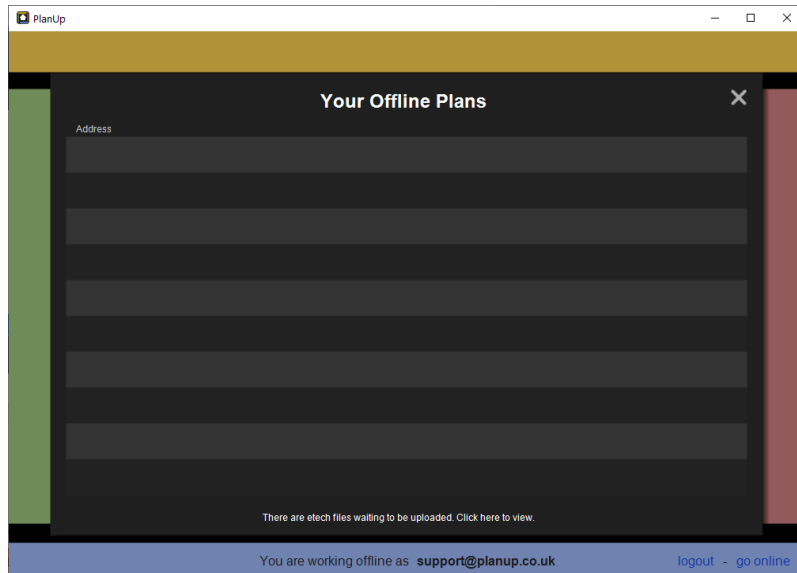


If you are online, make sure that you go offline by tapping *go offline* at the lower right of the screen (highlighted above). If it says *go online* you are already offline.

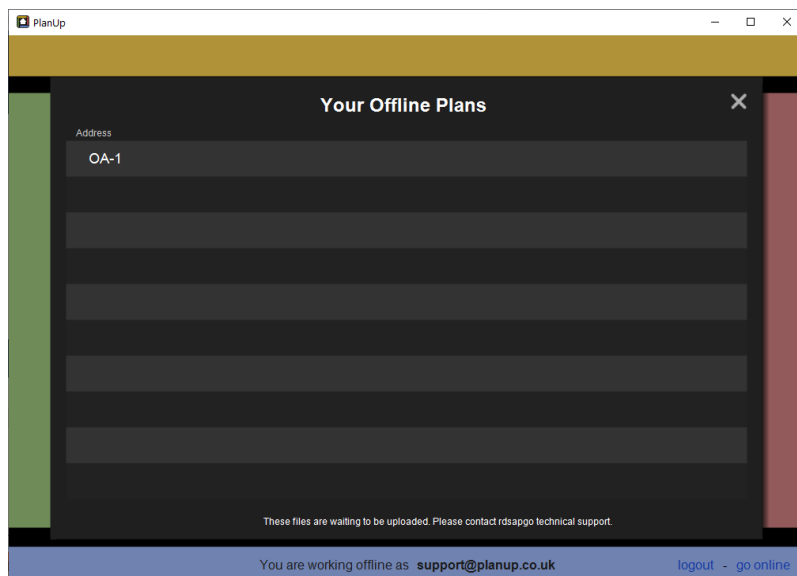
## Step 2: Access the Auto-save File List

To access the auto-save file list:

- Tap *Open* to get to *Your Offline Plans* list.



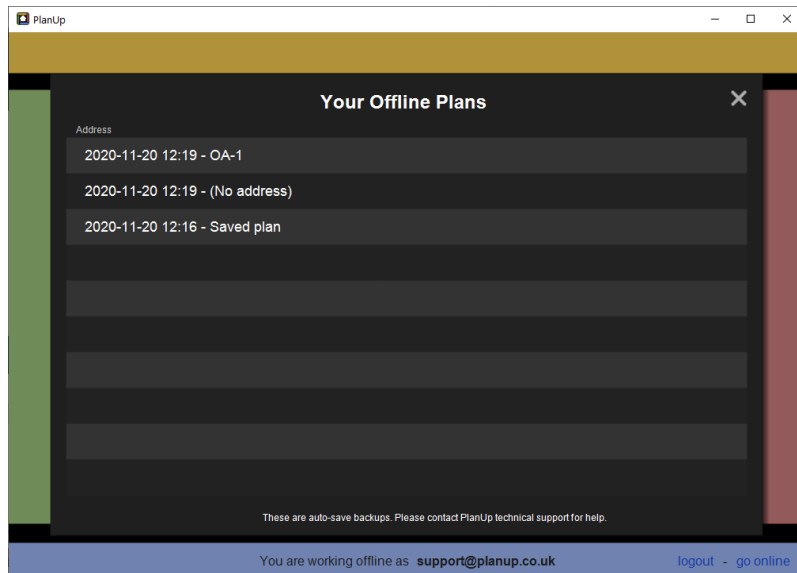
- This list shows any plans started directly in PlanUp, but have not yet been uploaded to PlanUp servers.
- If you have plans that were started via Smart Survey but not finished, the white text at the bottom will read: *There are eTech files waiting to be uploaded. Click here to view.* Tap on this.



- If the missing plan is not one of these, then tap on the white text at the bottom reading *These files are waiting to be uploaded. Please contact eTech technical support*

**NB:** If you do not have any Smart Survey plans to upload the text will read: Any missing plans will be available when you go back online

- Any auto-saves will be listed here in date and time order with the most recent at the top



The auto-saves present will display the date and time that the auto-save last took place followed by the first line of the address if one had been entered. If no address had been entered it will say *(No address)* instead.

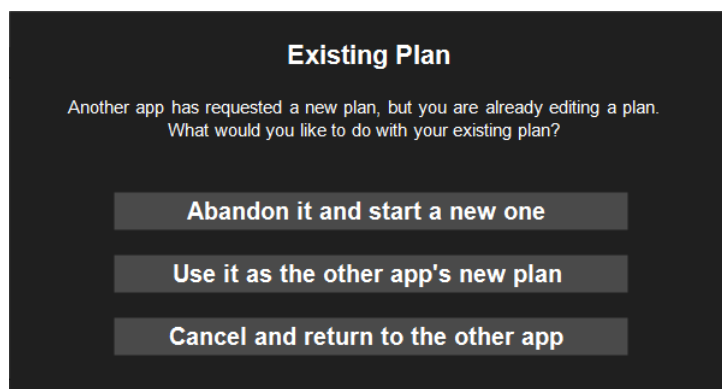
If you had saved the plan but cannot see the first line of the address, remember to check any that have no address against them.

### Step 3: Open and import the Auto-save to Smart Survey

Once you have identified the relevant auto-save from the list, simply tap it to open it.

Doing this will create a whole new plan and leave the selected auto-save as it was in case there are any further problems so you still have the same auto-save to go back to. You can now import the plan back into Smart Survey. To do this:

- Tap on the iPad *Home* button to return to the iPad home screen.
- Now open Smart Survey, and open the relevant survey.
- Tap the relevant option to open PlanUp
- PlanUp will now open showing the following message:



- Select the second option: *Use it as the other app's new plan*, the screen should then show as it was in PlanUp before you returned to the iPad home screen
- You can now complete any additional work for the floor plan/survey as normal.