

**planup**  
floor plans for everyone

## User Guide

Website: [www.planup.co.uk](http://www.planup.co.uk)

Email: [support@planup.co.uk](mailto:support@planup.co.uk)

Tel: 03458 678 222



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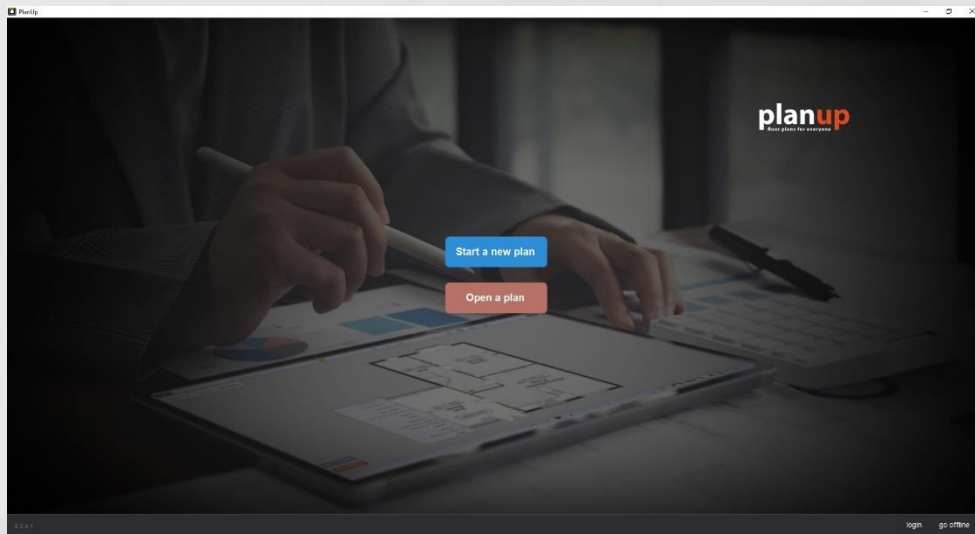
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# Welcome to PlanUp

This user guide will help you with the basics of using **PlanUp** to create floor plans and property descriptions on your Windows, iOS, MacOS, or Android device.

## Using PlanUp

On opening **PlanUp** you will see a window like the one below open:

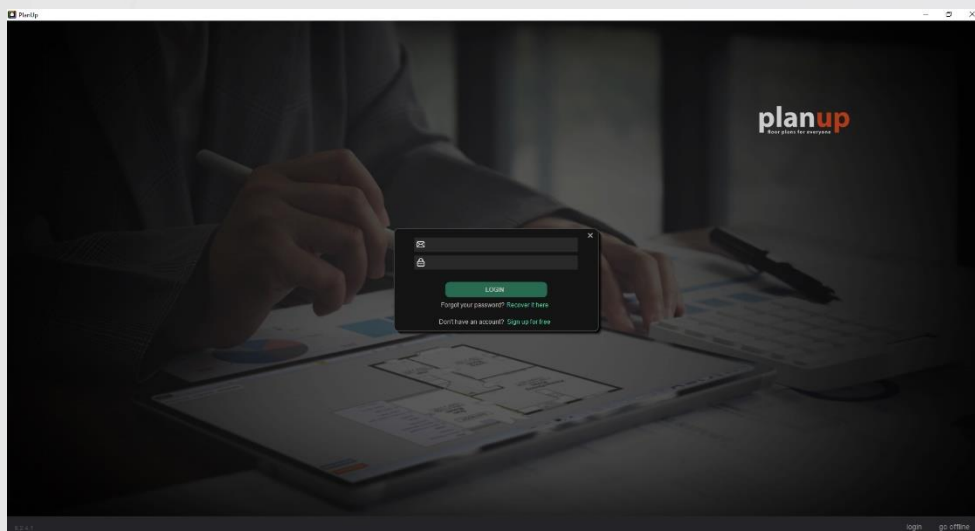


You can either:

- Tap on *login* to login or create a new **PlanUp** account; or,
- Tap *New* to start drawing a plan – you do not need to log in first.

## Login or Create a New PlanUp Account

You will then see the following screen:

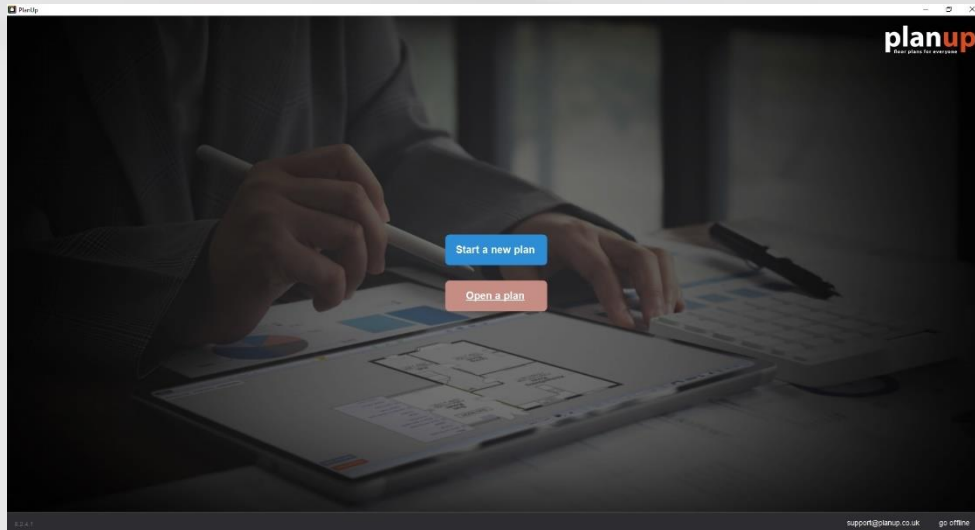


If you already have an account with us enter your email and password details and tap *Sign in*.

If you do not have an account tap on *Sign up for free* and fill in the form as required.

**NB:** *You will be sent an email to verify your email address before you can start using your account.*

If you have set up a new account, you will be returned to the same screen as before. If you have logged in to an existing account the original screen will have changed slightly to show the email address you are logged in as, like the example below:



To begin tap *Start a new plan* and you can start drawing your first room.

## Starting a New Plan

There are four steps to follow for drawing each room. Apart from a few exceptions, best practise is to follow the four steps in order. Working through each room in the same order every time will soon become second nature.

The following sections will give you the basic ideas for drawing rooms and creating a plan. For a complete run through drawing an example plan check out Getting Started Guide available from:

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

It is best practise to complete each room fully before moving on to the next room.

### [Step 1 - Draw the outline of the room and enter measurements](#)

[Recommended desktop/laptop method](#)

[Recommended tablet method](#)

### [Step 2 - Name the room](#)

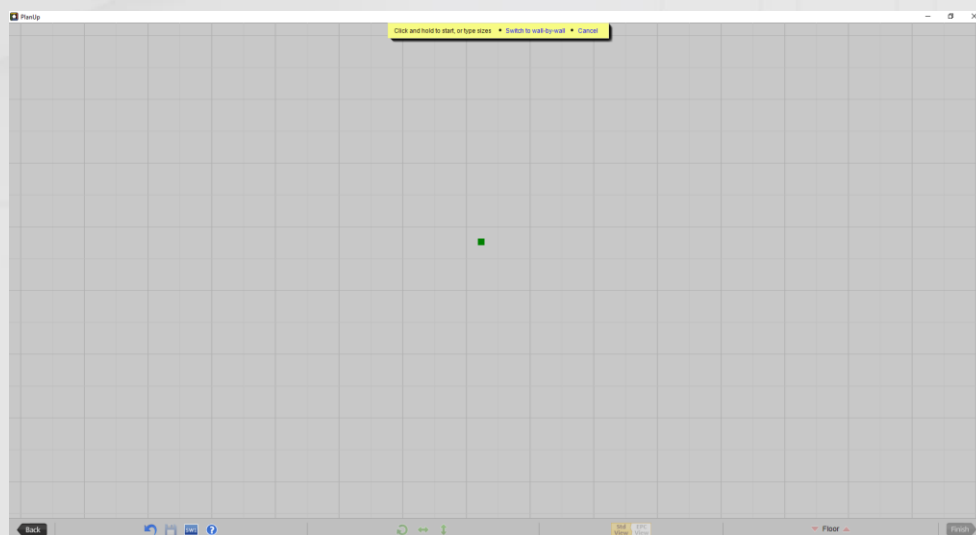
### [Step 3 - Add items to the room](#)

### [Step 4 - Add room descriptions](#) (only if you plan to use our property descriptions)

## Step 1 - Draw the Outline of the Room and Enter Measurements

As you have different input options available on a desktop/laptop compared to a tablet, there are different recommended methods depending on what type of device you are working on.

Once you have tapped on *Start a new plan* you will see something like the following:

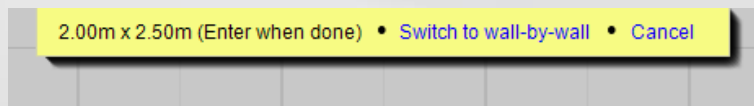


From here the recommended method varies slightly according to the device type you are using.

### Recommended Desktop/Laptop Method

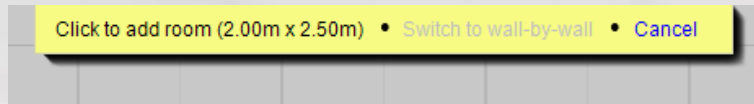
You can set a room size simply by typing the required measurements using your keyboard.

For example, to create a room that is 2.00m wide by 2.50m deep, type '2.00' (width measurement) and hit x or *Enter* to move onto the next measurement. Now type '2.50' (depth measurement). As seen in the screen snip below the measurements you type will appear in the yellow banner at the top of the PlanUp window:

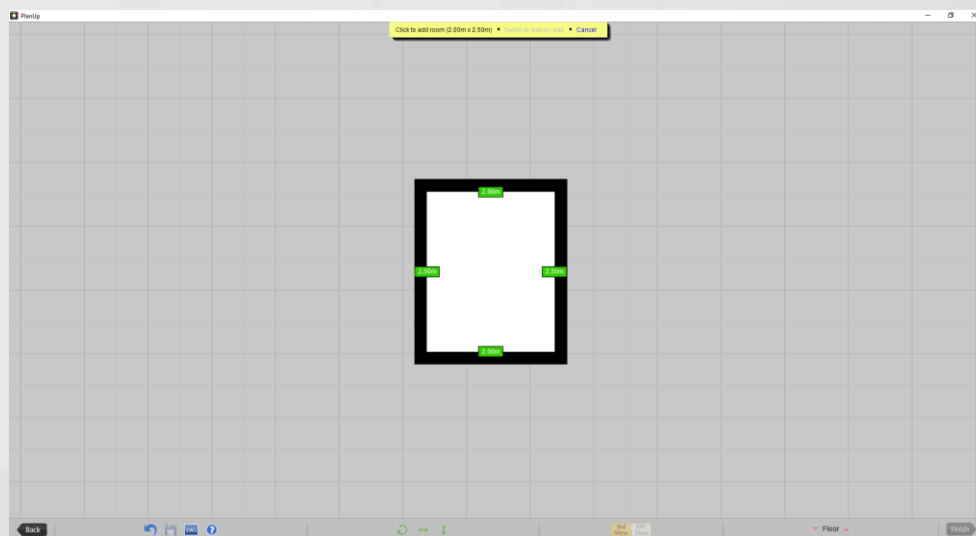


If you make a mistake, simply use the backspace button to delete the mistake and then re-enter as required.

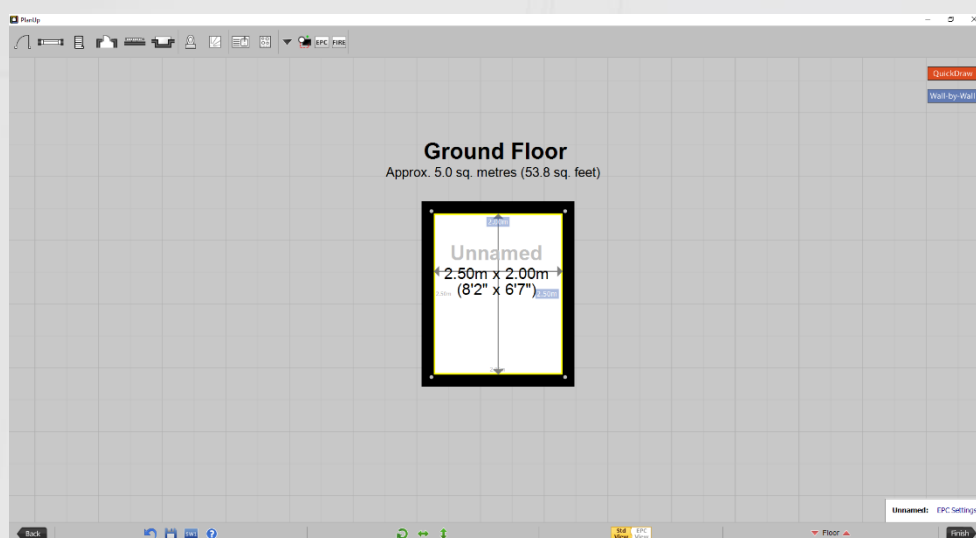
Now press *Enter* to confirm these measurements and the yellow banner will update to the following:



On moving your mouse, you will see an outline of the room appear, like the one below:



When ready tap to add the room:

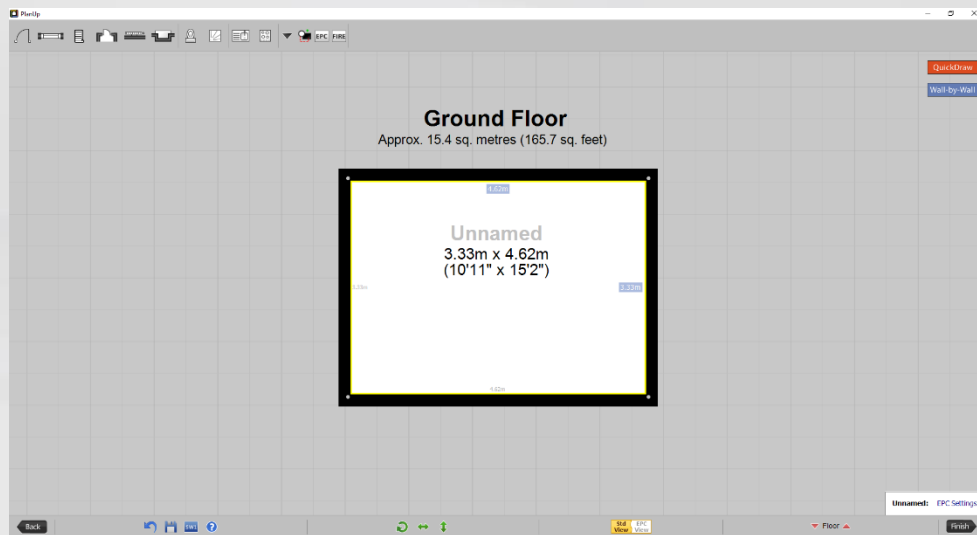


### Recommended Tablet Method

Tap on the screen and drag to create a room (don't worry about the measurements yet), release to finish.

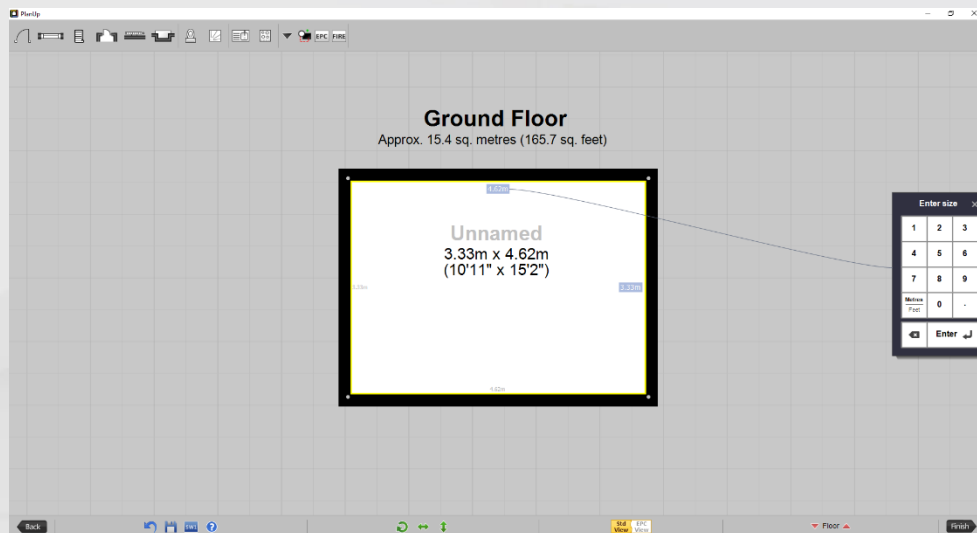
You will now have a screen similar to the below (The measurements on the room you have drawn may differ to our example):





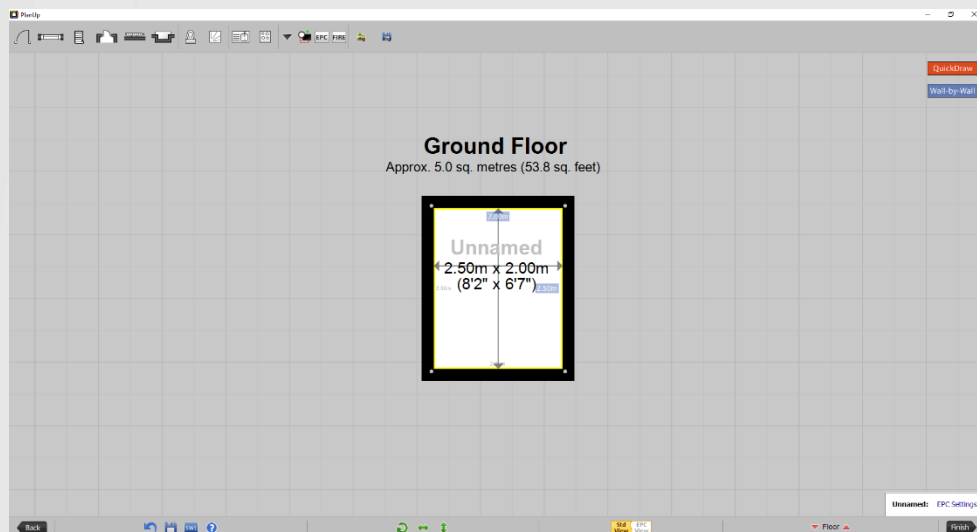
Now to set the correct measurements. For this example, we want a room of 2.00m x 2.50m.

Tap on the blue measurement box on the top wall. You will now get a number pad on the right-hand side of the screen. Type 2 and tap *Enter* to set the measurement to 2.00m:

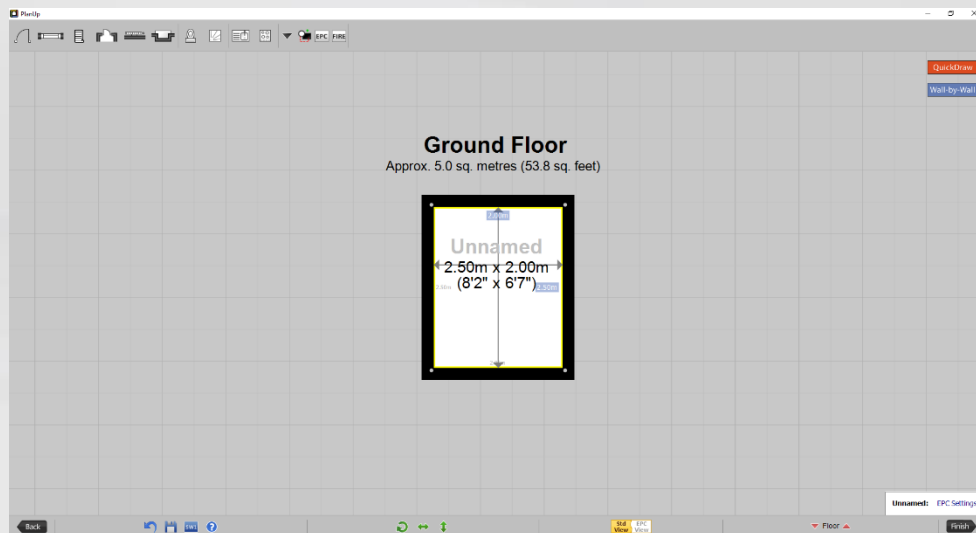


Now tap on the blue measurement box on the right-hand wall and type 2.50 and tap 'Enter' to set the measurement to 2.50m.

The room is now the correct size.

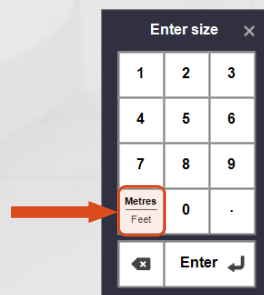






## Using Imperial or Metric Measurements

PlanUp will use metric measurements by default, but you can switch to use imperial if you prefer. Should you need to change the guideline units between metric and imperial this can be done by tapping on the Metres/Feet button on the number pad as indicated below:



You can open the number pad by tapping on any measurement in a blue box in the room currently selected.

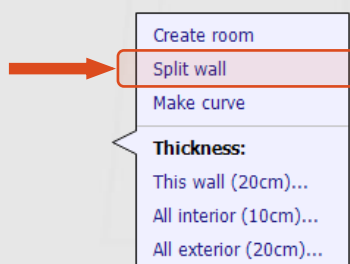
If a room has not yet been drawn, simply tap and drag to create a basic room. This room can then either be adjusted for the first room or deleted to start again.

## Re-shaping Rooms

Once you have drawn a room, it is possible to re-shape it if necessary. Here are some helpful tips if you need to re-shape a room.

### ***Splitting Walls:***

To split a wall (for instance to create an L-shaped room), tap on it to get open a pop-up menu similar to the below:

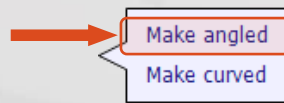


Tap where it says *split wall* as indicated above to add the split. You can now drag the two sections of wall independently.

You can also double tap on a wall to add a wall split.

### ***Make an Angled Wall:***

To turn any external corner into a diagonal wall tap on the corner (the grey dot where the wall changes direction to open the pop-up menu as shown below:



Simply tap where it says *Make angled*. If necessary, you can change the angle of the wall by tapping on one of the new corners and dragging as desired to adjust it.

### ***Curved Walls:***

Tap on the corner or wall you want to make a curve.

If you tapped on the wall the same pop-up menu as indicated in the [Splitting Walls](#) section above appears.

If you tapped on the corner the same pop-up menu as indicated in the [Make an Angled Wall](#) section above appears.

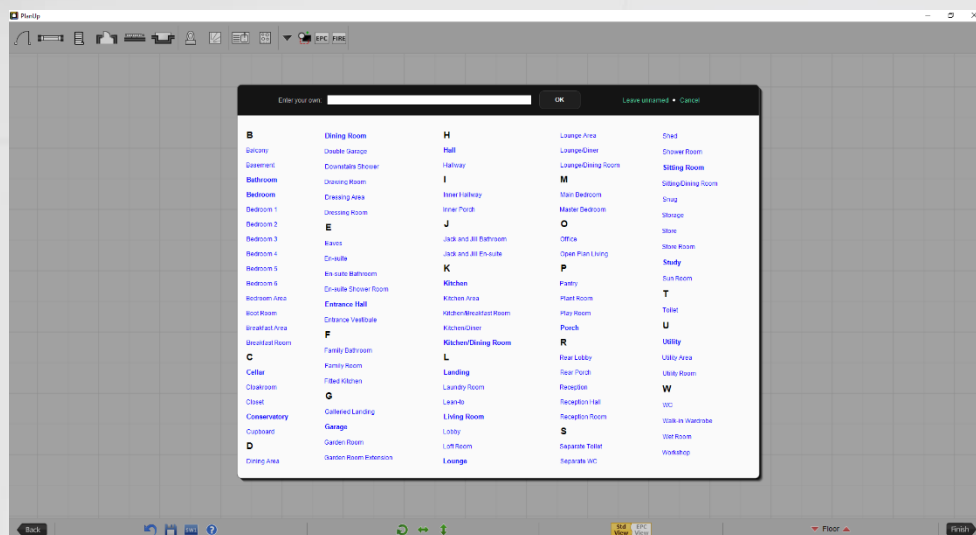
On both of these menus is an option to *Make curved*. Tap on this to turn the wall/corner into a curve.

**NB:** You can only access the corner menu on external corners i.e. there is no adjoining room.

## **Step 2 - Name the Room**

It may sound obvious, but if you forget to name the room you will have to go back to it at some stage, so it's best to do it after shaping the room.

Simply tap where it says *Unnamed* in the room – a screen will open with an alphabetical list of room titles to choose from.



Simply select the title you wish to use, or you can type your own custom room names in the white box at the top of the screen.

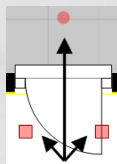
If you need to rename a room simply tap on the room title to bring up the room toolbar similar to that below:



Once you have selected the specific item you want to add a yellow banner will give you the specific instructions for that item.

**NB:** Please see [Appendix 1](#) for a full list of items available to add.

You will see that once an item has been added to a wall it has small red boxes, or 'handles', attached to it. These allow you to change the size of the item you have placed on the plan by tapping on them and dragging.



In addition to the square handles, some items have circular handles this is used to rotate the items.

## Step 4 – Descriptions

PlanUp automatically builds up a property description as you draw a floorplan. It's your choice whether you wish to use them or not.

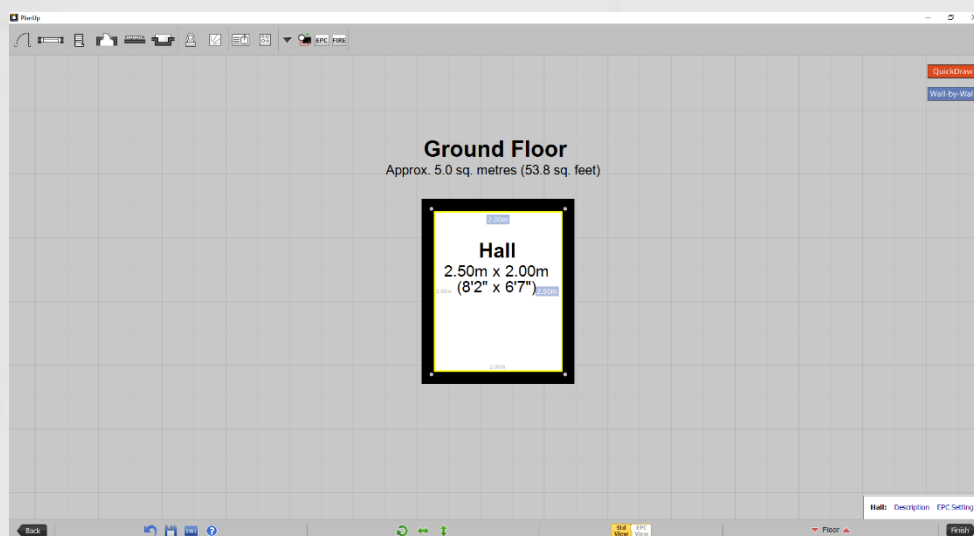
This includes rooms, measurements, and basic descriptions of items you add (for example Lounge: 2.50m (8'2") x 2.00m (6'7"). Window to front, fireplace, door to....).

In addition to PlanUp creating the basic descriptions, you can add further detail (for example, describing a window as double glazed etc). To do this simply click on a symbol you have added in the room, and you will see a describe option. Tap that to enter the descriptions for that item.

You can also describe the features of the room.

Once you have named a room you will see that a box appears in the bottom right corner with the room title and then it will say *Description*.

**NB:** Using the DEA version this box will also have the menu to access EPC functionality – the EPC Settings option will be available as soon as the room has been drawn. Please see [Recording EPC Data](#) for more information.



Tap on this and a window will pop-up giving you options of what to describe e.g. floor, walls, ceiling, shape etc. Some room titles will have additional options for descriptions e.g. kitchens will have the option to describe units and appliances as well as the standard options.

Tapping on one of these allows you to choose the description you want to add from a pre-set list, or using an edit option to enter your own custom descriptions.

## Describing the Outside

You can also describe the external appearance of a property. This can be done from any named room. Simply tap on the *Description* option in the lower right corner once a room has been named, and as well as the floor, wall, etc, you will also see an option for *Outside*.

When you tap on outside, you will be presented with a screen giving you options for adding descriptions about the front, left side, right, or back. Simply select as you wish and then enter descriptions using either a pre-set list or the edit option to enter your own custom descriptions as with the room descriptions.

## Adding Another Room

Once you have completed your first room you are ready to move on to the next.

It is highly recommended completing each room fully before moving on to the next room.

There are a number of options for how to draw the next room:

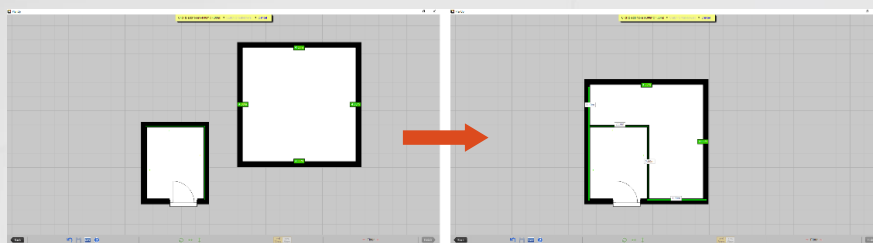
### Option 1: QuickDraw - With Measurements (Desktop/Laptop Only)

This is the method used in the [recommended desktop/laptop method](#) from [Step 1](#) above.

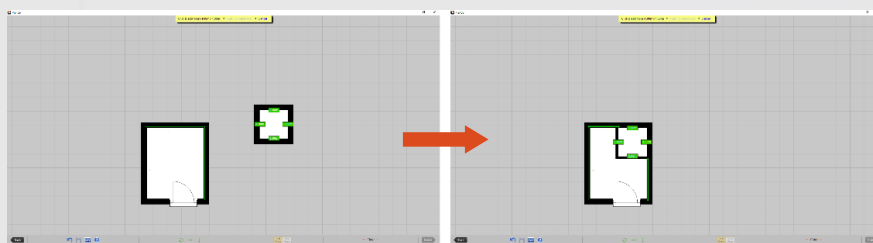
Activate the QuickDraw (by tapping on the orange QuickDraw button in the top right or by tapping Q on your keyboard), enter the measurements (remember, width x depth), press enter and tap to add the room in the appropriate place.

One important additional bit of functionality is how you can add the room. You can simply line up the room to the existing room as necessary, but the room does not have to be added as a simple rectangular shape. As well as being able to place it next to existing rooms, you can:

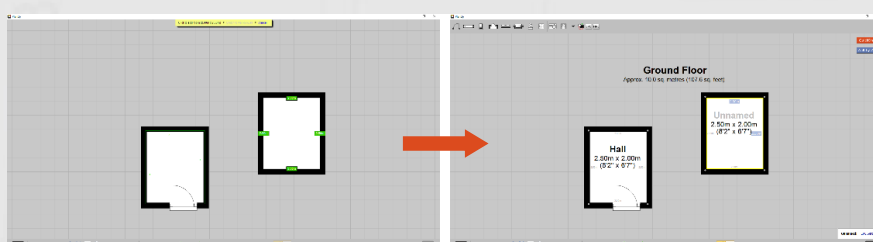
- Wrap it round any existing rooms, e.g.



- Place it within the existing room, e.g.



- Add it as a completely separated room to create outbuildings, e.g.

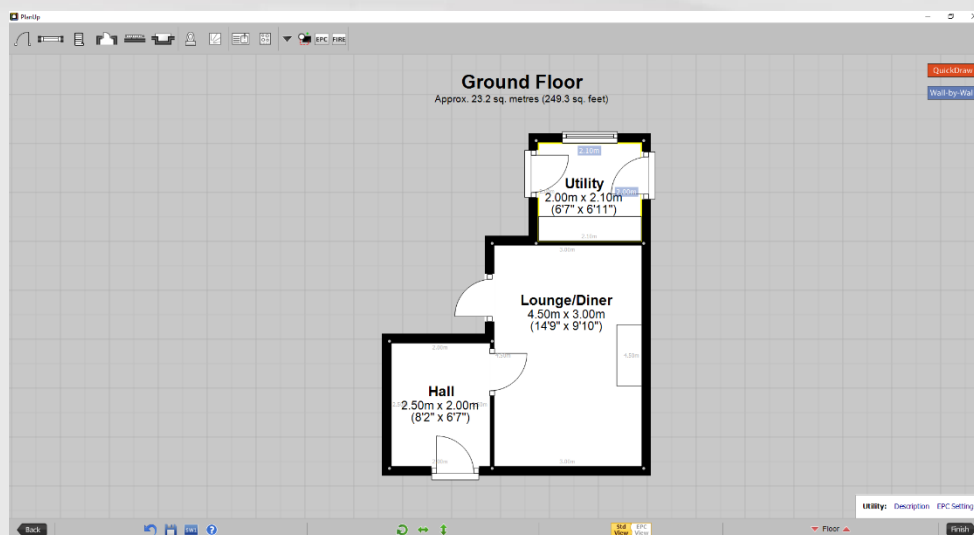


## Option 2: QuickDraw – Tap and Drag

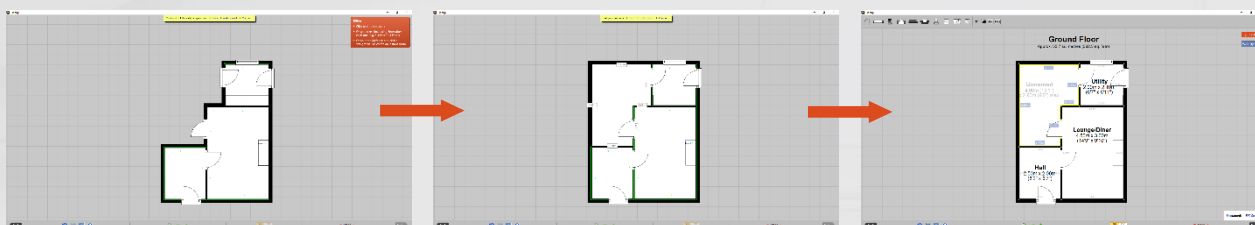
You can also use QuickDraw to simply tap and drag to create a room – this may be particularly helpful when all you need to do is fill the remaining space.

To use this method activate QuickDraw (by tapping on the orange QuickDraw button in the top right or by tapping Q on your keyboard), and simply tap where you want to start the room from and then drag to the required size.

Using this method will merge around any existing rooms if necessary too. For example, with a situation like that below and you simply want to fill the space in the top left to make an overall rectangular property:



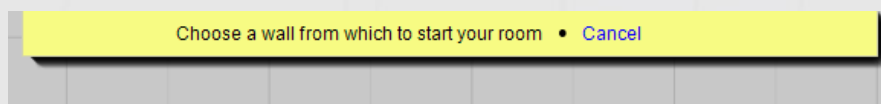
Activate QuickDraw, and then tap on the top left hand corner of the *Utility* and drag down to the top left hand corner of the *Hall* as indicated below, then release to add the room:



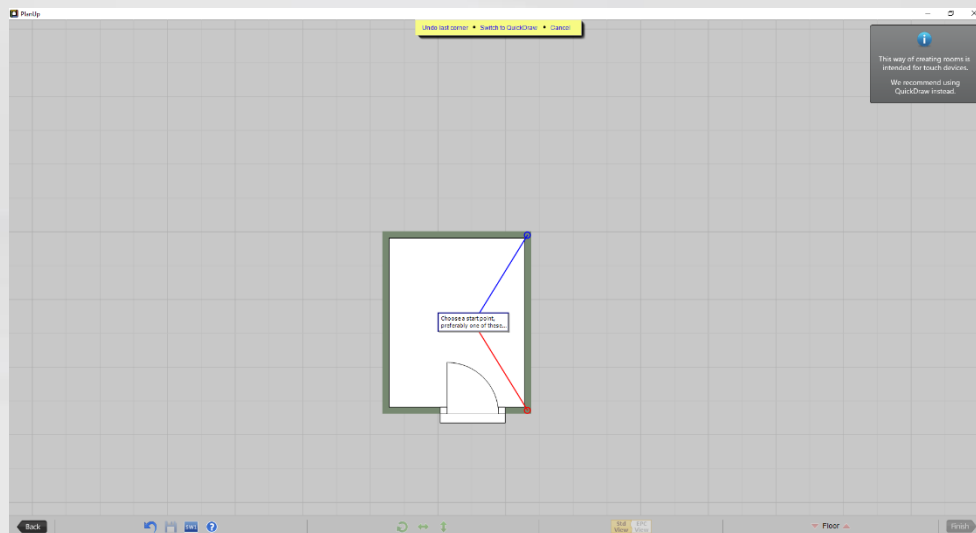
## Option 3: Wall by Wall

**NB:** Please note that you cannot use this method to draw a room within a room as you can with QuickDraw.

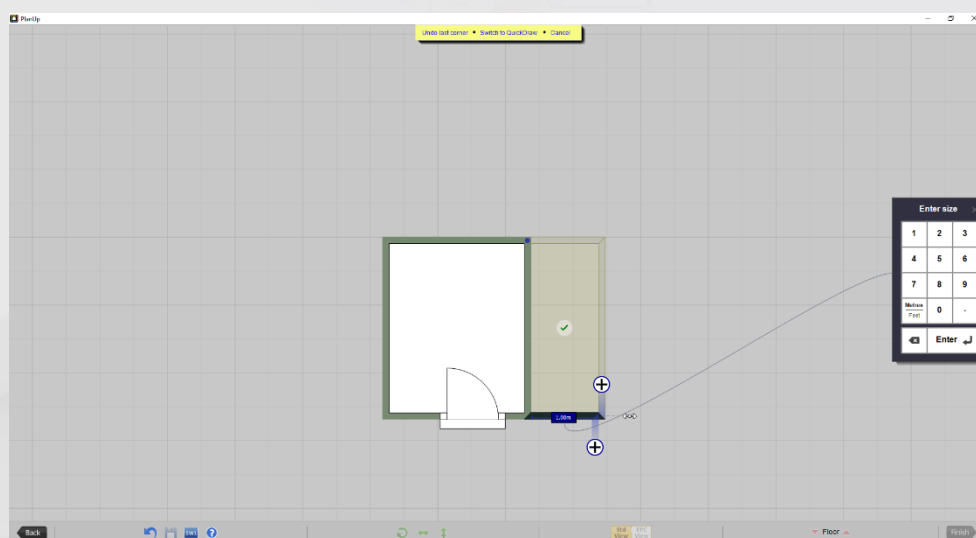
First of all tap on the blue *Wall-by-Wall* button towards the top right corner. You will see the top toolbar change to the following yellow banner:



Choose a common wall between the rooms to start from and tap on this wall. You will now see a screen like the following:



As directed, select one of the suggested starting points. For this example we will start from the red point. Once you have selected the starting point, a 1 metre wall will be added, like the below:



**NB:** If you start from the red point the software will expect the room to be drawn in an anti-clockwise direction. If you start from the blue point the software will expect you to draw the room in a clockwise direction.

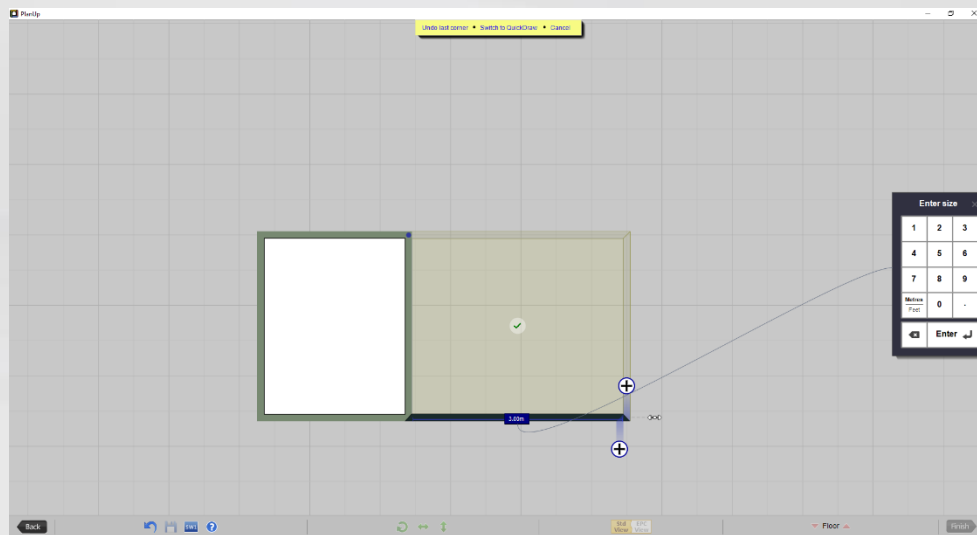
Notice there is now a ghost image of a suggestion the software is making for the room it thinks you may be trying to create with a green tick in the middle. If you are further into the plan there is the possibility this option will be what you want, in which case you can tap the green tick accept the suggestion and complete the room. Most of the time this will not be the case so tapping on this button now will not save you time.

You can now either:

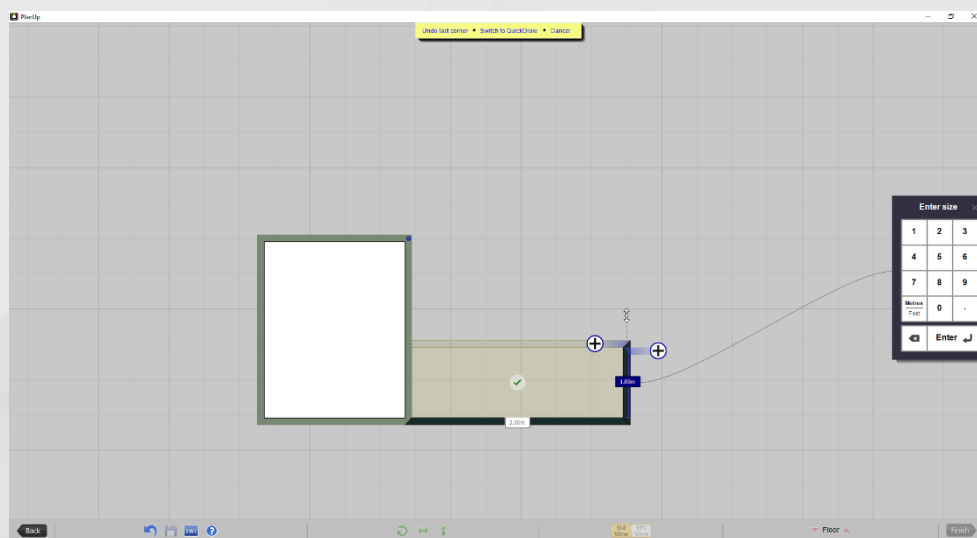
- Tap on the double headed white arrow and drag the wall to the correct length.
- Use the number pad (on screen or on your keyboard) to type the measurement and tap enter to confirm. This will draw the wall to the required length.

If you make a mistake whilst drawing the room, it can be undone by pressing the undo button (↶) on the bottom toolbar or by selecting *undo last corner* from the yellow banner at the top of the screen.

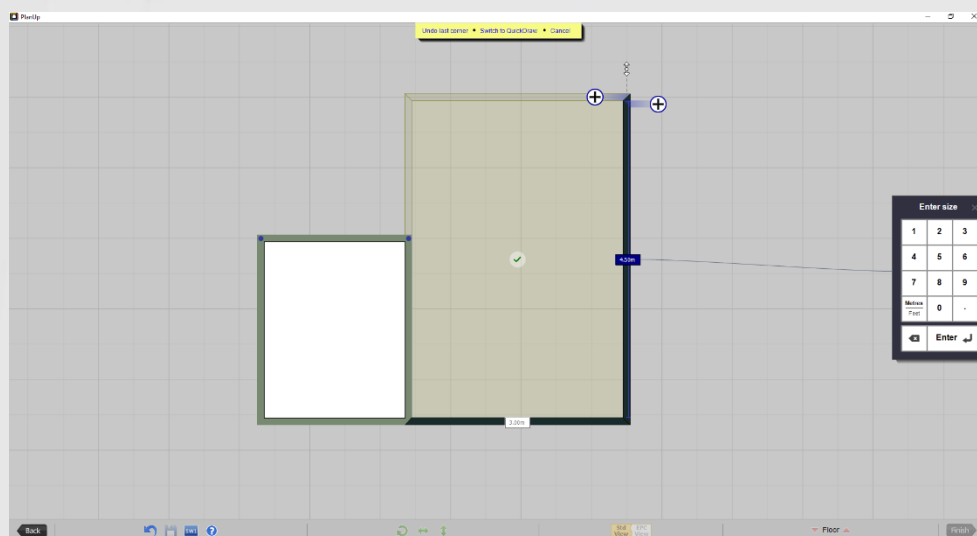




To create the next wall, tap on one of the blue circles with a '+'. This will create a 1 metre wall similar to when you chose the starting point of the first wall.



Now drag or type the measurement as before to get this wall to the correct size.



Notice now that the ghost image suggestion has changed the suggestion that was made previously:

- If this suggestion is now showing what you want, then simply tap this to create the room.

- If the suggestion is not showing what you want, create the next wall in the same way and keep going until the suggestion is correct to finish the room.

## Navigating Around a Plan

As you proceed with drawing a plan, the screen will start to fill up. When you want to change the position of the plan on the PlanUp window simply tap anywhere on the plan (apart from the handles) and drag to move it to a more convenient position.

To zoom in or out of the plan:

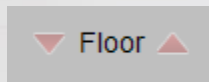
- Use the scroll wheel on your mouse in Windows.
- Use Ctrl and +/- in Windows.
- If using a laptop with a dual input touchpad you can use pinch and pull similar to what you would do on a tablet.

## Adding a Floor

There are two ways to add a new floor:

### 1) Floor button on bottom toolbar

- On the bottom toolbar are two arrows with *Floor* written in between them.



- Tapping either arrow will ask if you want to add a new floor if one does not already exist in the relevant direction – if a floor already exists you will simply be taken to it.

### 2) Using stairs:

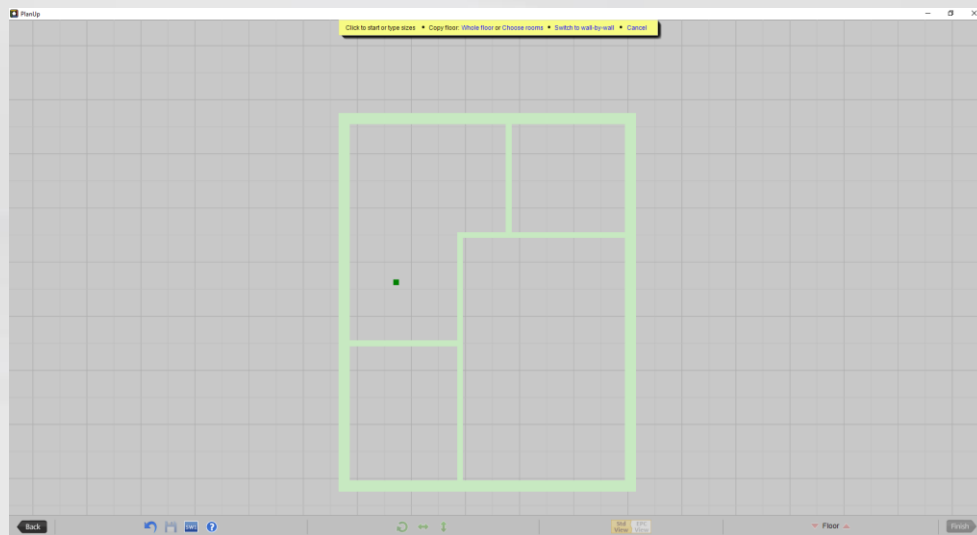
- Add a set of stairs to the property.
- Tap *Go Upstairs...* on the stairs menu (if not showing simply tap on the stairs).

We suggest using option 1 so that the stairs are not a potential distraction when drawing the next floor.

## Landings – Starting a New Floor

Landings are not always the best place to start a new floor from, as there is not necessarily a convenient anchor point on the floor below.

When you go up to a new floor you will be shown a green outline of all the rooms you have created on the floor below.



Simply use the method outlined in [Starting a New Plan](#), and then continue adding other rooms using one of the methods described in [Adding Another Room](#).

**NB:** *There might be an occasion when the positioning of floors does not quite match or when there are no convenient starting points for the first floor. In these instances, you can use the stairs to adjust the relative floor positioning.*

## Using EPC Functionality

Whilst using PlanUp it is possible to record elements of EPC data at various stages of drawing the plan.

You can record:

- Positions of EPC related items using a variety of [EPC symbols](#) e.g. stopcocks, boiler flues, loft hatches etc.
- [Item specific data](#) e.g. glazing and draft proofing for doors, windows etc.
- [Room specific data](#) e.g. is the room habitable, heated, part of the main building or an extension, etc.
- [Heat loss types](#).
- [Construction and insulation details](#).

Everything listed below recorded for the EPC in PlanUp will be collated/used for calculations as appropriate in a report which will be available after finishing the plan – see [EPC Report](#).

## 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 items are detailed in full in [Appendix 1: Top Toolbar Reference](#).

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

## Item Specific Data

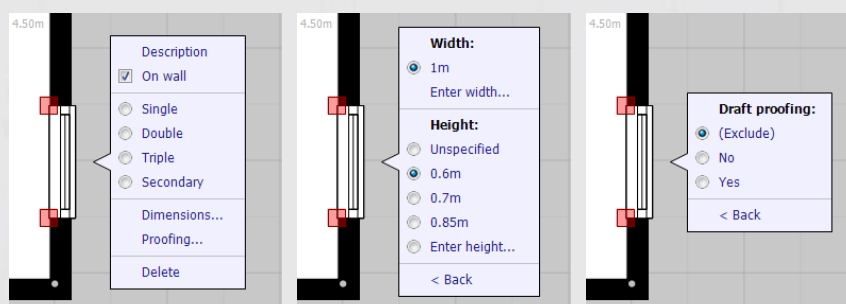
Certain standard items can have EPC information recorded about them – windows, doors, fireplaces, radiators, showers, and baths.

### Windows

All windows have the option to record:

- Glazing.
- Dimensions.
- Draft proofing.

To do this tap on the window to bring up the pop-up menu. You will see on the menu options for each of the above items:



The width of the window can be set either drawing it to size or by setting the width in the *Dimensions...* menu. If the height is set as well, the window area will be removed from the alternative wall areas 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:

- Glazing/Frame.
- Draft proofing.
- The number of openings.
- Dimensions.

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

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



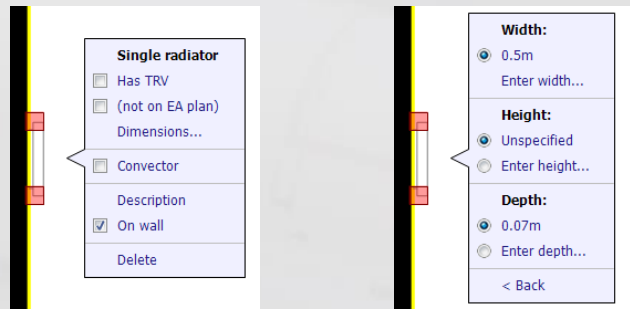
The width of the window can be set either drawing it to size or by setting the width in the *Dimensions...* menu. If the height is set as well, the window area will be removed from the alternative wall areas as appropriate.

## 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.

You are also able to record the dimensions of the radiator and if it is a convactor.

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

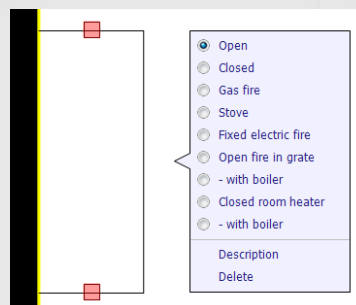


The radiator and other heater options available are:

- Single/double/triple radiator.
- Alternative radiator.
- Storage heater.
- Heated towel rail.
- Warm air vent.
- Electric heater.
- Column radiator
- Water/oiled filled radiator.

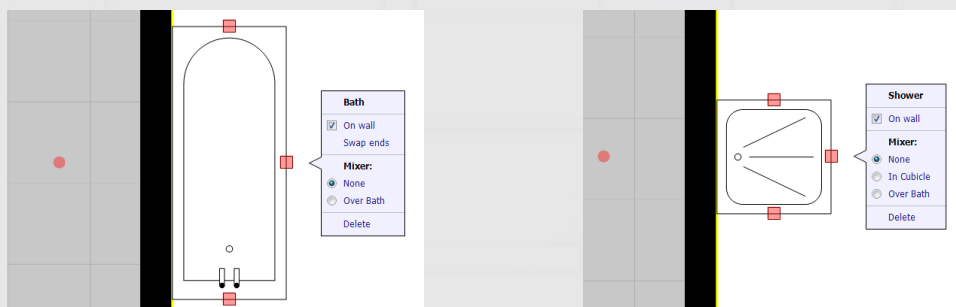
## Fireplaces

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



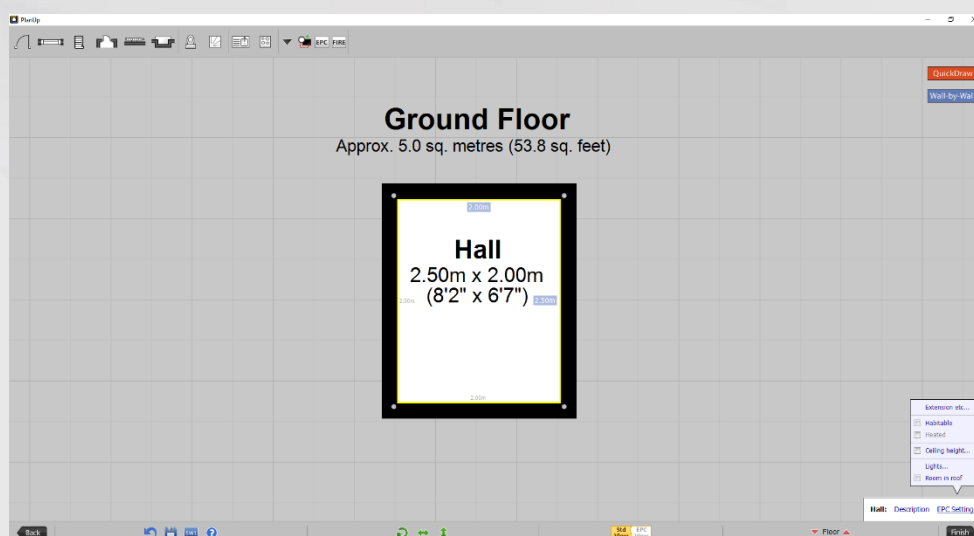
## Baths and Showers

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

Once a room has been drawn there will an *EPC Settings* menu available at the lower right corner of the window – this allows you to record EPC data specifically for the selected. Tap on EPC Settings to show the menu shown below:



From this menu you can:

- Select *Extension etc...* to record:
  - If the room is part of the main house.
  - If the room is part of an extension – up to 4 separate extensions can be noted.
  - If the room is a non-separated conservatory – please see [Heat Loss and Construction](#) for how to set glazed perimeter details. This is a heat loss type.
  - If the room is to be excluded from the EPC.
  - The construction for the section of the house that room belongs to e.g. main, extension 1, etc.
  - The insulation for the section of the house that room belongs to e.g. main, extension 1, etc.
- Note 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 - adding a radiator will automatically mark the room as heated.
- 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.



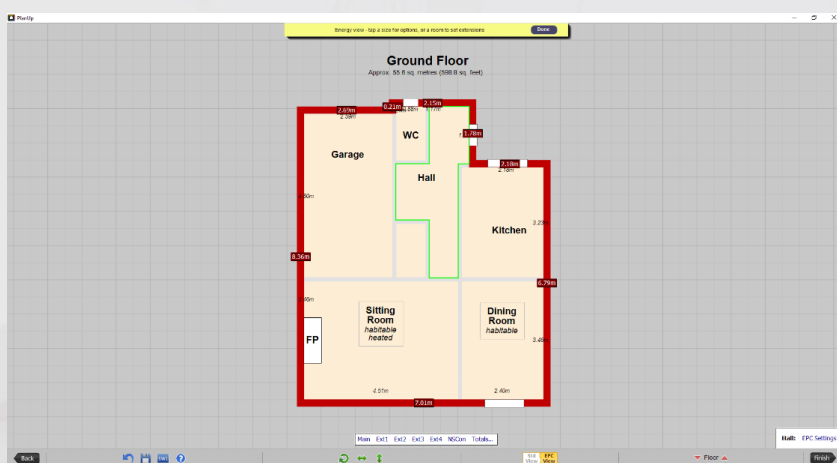
- Newly created rooms will be marked as the same height as the room they were created from by default.
- Note the number of lights – a count of both normal and low energy bulbs is available.
- Note if the room is a room in the roof.

## 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:

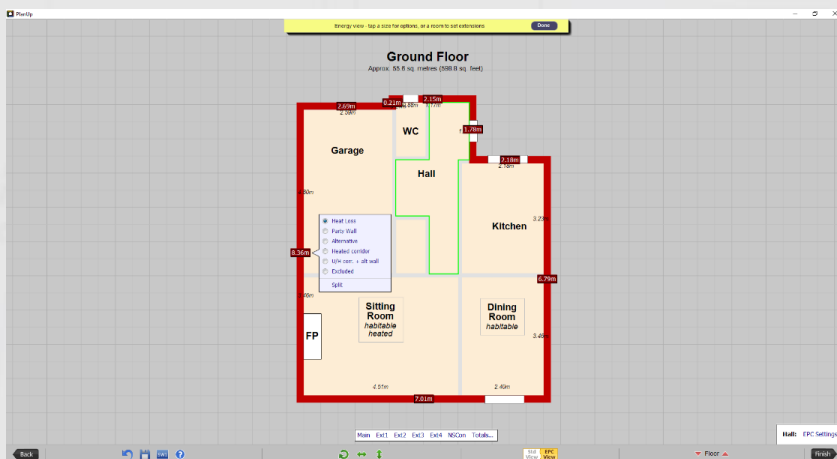


## Heat Loss

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, select *Measure...* from the top of the pop-up menu and 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.

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

## Construction and Insulation

You can record one construction type for each section of the plan – main, and extensions 1-4.

To do this:

- Tap on *EPC Settings* at the bottom right of the screen, then tap on *Extension etc...* to display the *Room EPC Settings* panel.



- On the left will be options for what section of the house the selected room is in.
- On the right you will have options for the *Construction* of the section the selected room is part of.

- Select as appropriate and tap the cross at the top right of the *Room EPC Settings* when done.

This can be done in either the EPC view or the standard view.

The selected room will have its given room title displayed next to the *EPC Setting* button. The selected room will also be highlighted with either a green (in EPC view) or yellow (in standard view) outline just inside the wall.

## EPC Report

This can be saved from any image email you request to be sent or from the Direct Save options as detailed in [Saving Final Images](#).

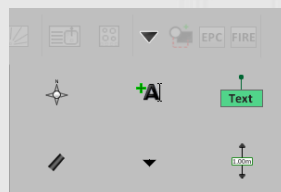
## Additional Helpful Features

There are some further symbols not listed above with some additional functionality that can help with plan information/display.

### More (▼)

From this sub menu you can add:

- [a compass](#)
- [additional room titles](#)
- [notes](#)
- [freehand walls](#)
- [arrow heads](#)
- [lines/arrows](#)



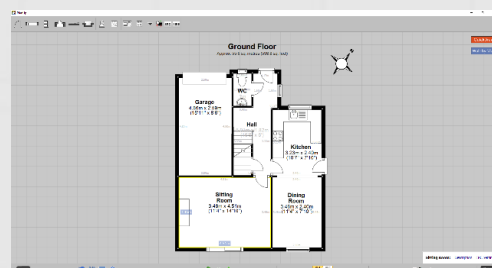
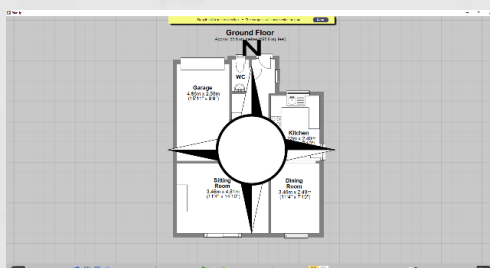
### Compass

You can add a compass to show the orientation of the property.

Simply hover over the icon for the *More* sub menu (▼, tap if you are using a touch device), and the compass icon is the first icon on that menu.


Unlike other symbols, tapping on the compass icon instantly adds it to the plan, and allows you to set the direction by tapping/dragging on the plan as necessary.

When the direction has been set, tap done on the yellow banner at the top of the screen.



## Additional Room Titles

On occasions you may want to add an extra title to a room to mark different areas.

To do this, simply select the additional room title icon from the *More* sub menu () , and then tap on in the room you wish to add the extra title to.


This will now give you the standard room title selection screen to choose as necessary or type a custom title.

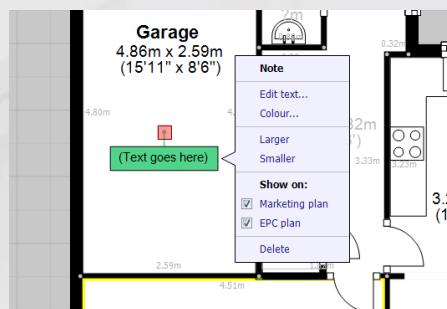
When selected this will return you to the normal view with the additional title added. You can now drag this title where you want it in the room.

## Notes

You can add notes to your plan to annotate as required.

To do this:

- Select the notes icon from the *More* sub menu () and tap on the plan to add it.
- Once added, you can tap and drag on the text box to move just the text box, leaving the marker in place. You can also use the handle on the marker to move just the marker and leave the text box where it is.




- From the pop-up menu on the Note you can:
  - *Edit text...* - add/amend the text as required.
  - *Colour...* - change the colour of the note and make it semi-transparent if required.
  - Make the text *Larger*.
  - Make the text *Smaller*.
  - Show on/hide from the *Marketing plan*.
  - Show on/hide from the *EPC plan*.

## Freehand Wall

You can use freehand walls to show nub walls on open plan rooms or thicken walls.

Freehand walls are always attached to the main walls of a room. Once added handles are available to lengthen/thicken as required or rotate the wall.

To add a freehand wall simply select from the icon on the *More* sub menu () and then tap on the plan where you want to add it.

## Measurement Arrowhead (▼)

This is simply a shape that can be added to indicate the points where displayed measurements were

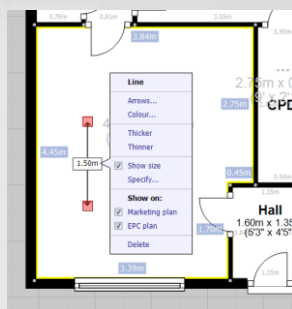
taken between.

Simply select from the menu and then tap where relevant on the plan.

## Line/Arrow ( )

Using this symbol, you can add full lines with measurement arrows. This could be used as an alternative to displaying room measurements or perhaps for surveyors indicating where pipe/wiring runs are or may be added.

To add the Line/Arrow tap on the symbol under the *More* menu and then tap to add to the relevant place on the plan.



Once added you will see handles available at each end to adjust the length/positioning of each end, or to simply move the whole symbol tap and drag on the symbol.

From the menu you can:

- Click on *Arrows...* to select option for how to show arrows or remove the arrowheads completely to leave a simple line.
- Click on *Colour...* to change the colour of the symbol (if the measurement is showing, the text will always remain black).
- Change the thickness of the line using *Thicker...* or *Thinner...*
- Choose to show or hide the size.
- Use *Specify...* to set the size, this will adjust the length of the line for you to match what you enter, please ensure the line is running in the right direction first.
- Show on/hide from the *Marketing plan*.
- Show on/hide from the *EPC plan*.

## Shapes ( )

Here you will find here a number of shapes with different colour/line types.

These shapes can be resized, but the colour cannot be changed from that shown on the icon.

Please see [Appendix 1: Top Toolbar Reference](#) for a complete list.

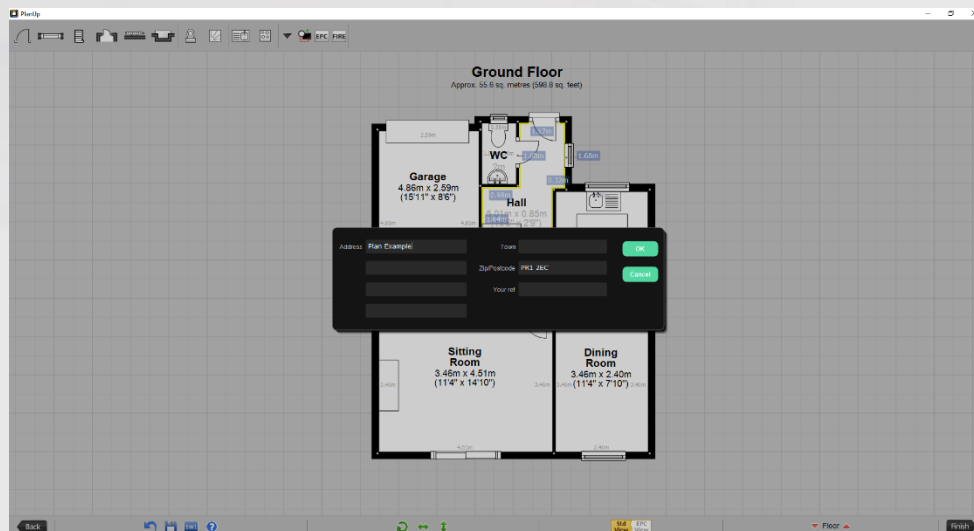
## Fire Symbols ( )

Here you will find a selection of symbols to show the location of Fire Safety related items.

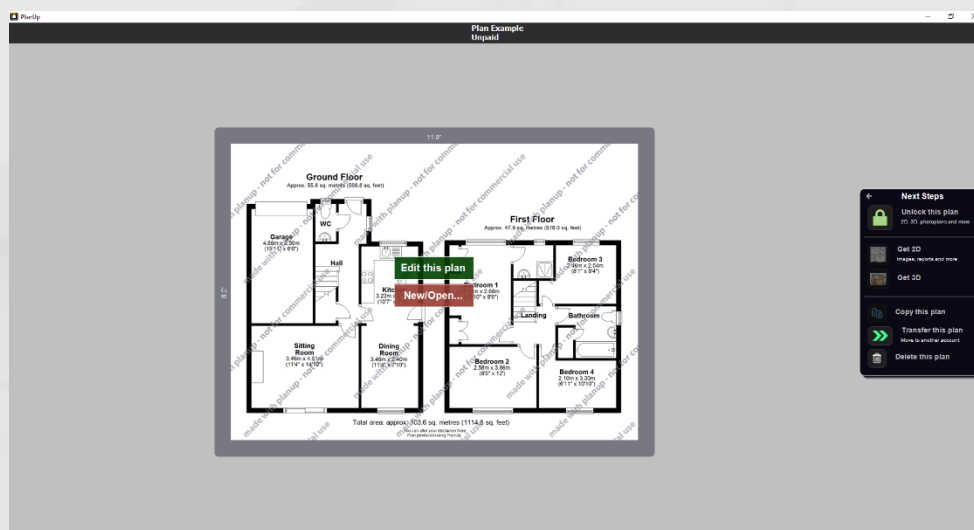
Please see [Appendix 1: Top Toolbar Reference](#) for a complete list.

## Saving Final Images

Once you have finished drawing the plan tap on the *Finish* icon on the bottom toolbar and enter the address and tap on *OK*.



If you are not already signed up to a subscription with PlanUp you will then get to a screen like this:



You will see options for:

- *Edit this plan*: Tap this to make amendments to your plan.
- *New/Open...*: Tap this to go back to the start screen of PlanUp where you can either start a new plan or to access a different plan.
- [\*Unlock this plan\*](#): This will give you options to pay for the plan so you can then save any images or other files you need.
- [\*Get 2D\*](#): This will allow you to customise and save the 2D images for the plan – this will only work once the plan has been unlocked.
- [\*Get 3D\*](#): This will allow you to customise and save the 3D images for the plan – this will only work once the plan has been unlocked.
- *Copy this plan*: This opens a copy of the plan and prompts you to enter a new address straight away – once entered tap finish to ensure the new address is saved. This will only work once the

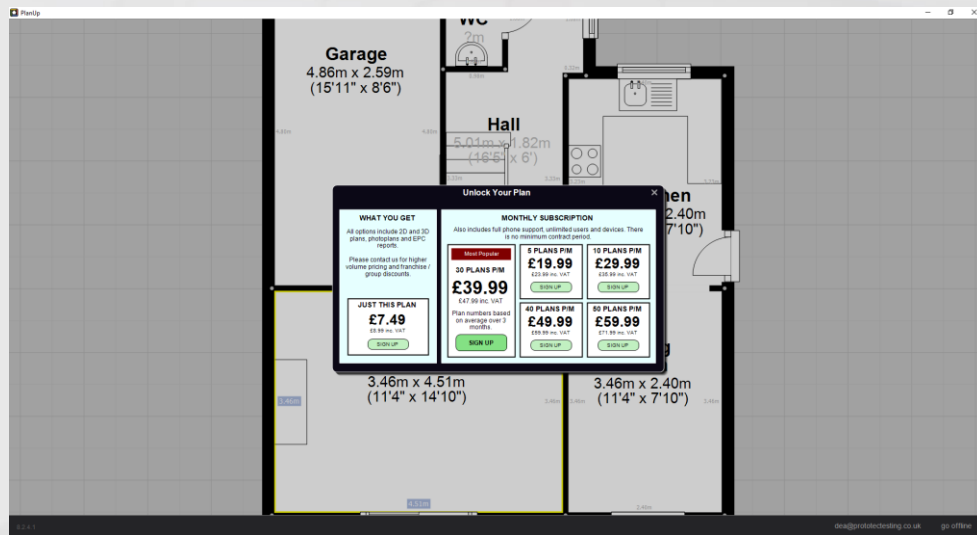
plan has been unlocked.

- [Transfer this plan](#): This allows you to request to move the plan from your account onto your client's account.
- *Delete* – Tapping this removes the plan from your list in PlanUp.

## Unlocking The Plan

Before you can save the images or any other files for use, you will need to remove the watermark.

To do this tap on *Unlock this plan*, and you will then see the options available for how to purchase the plan on a screen like this:



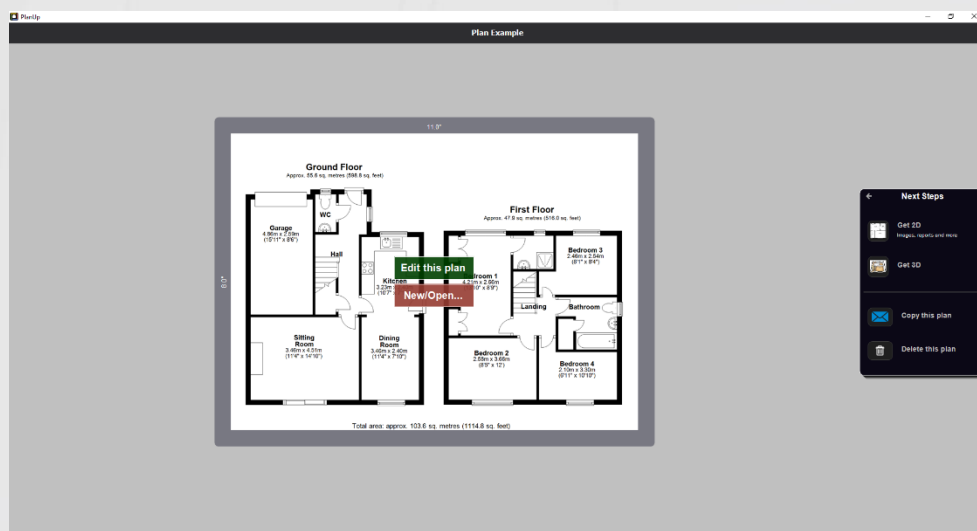
If you would like to discuss what options are available, please contact our team at [sales@planup.co.uk](mailto:sales@planup.co.uk) or by calling 03458 678 222.

Once you have made your selection, please follow the prompts to complete payment as necessary.

Once completed, depending on the option you chose you may need to tap on *Unlock this plan* again to complete the process.

## How to Get Images and Other Files

Once the plan has been unlocked, the screen will change slightly to look like this:





From here you can:

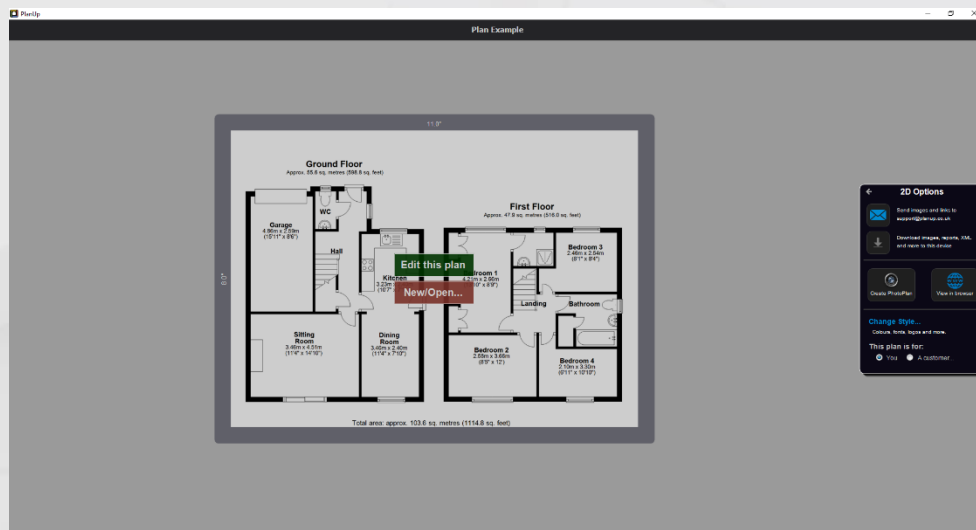
- Tap *Edit this plan* to make amendments to your plan.
- Tap *New/Open...* to go back to the start screen of PlanUp where you can either start a new plan or open a different plan.
- *Get 2D*: This will allow you to customise and save the 2D images for the plan.
- *Get 3D*: This will allow you to customise and save the 3D images for the plan.
- *Copy this plan*: This opens a copy of the plan and prompts you to enter a new address straight away – once entered tap finish to ensure the new address is saved.
- *Delete*: Tapping this removes the plan from your list in PlanUp.

The option to *Transfer this plan* option is now located after tapping get 2D.

## Get 2D

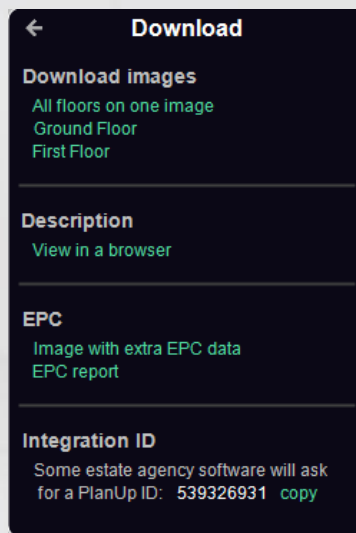
Once the plan has been unlocked you can tap on *Get 2D* to customise and save your 2D images.

Once you have tapped on *Get 2D* you will see a screen like this:



From here you can:

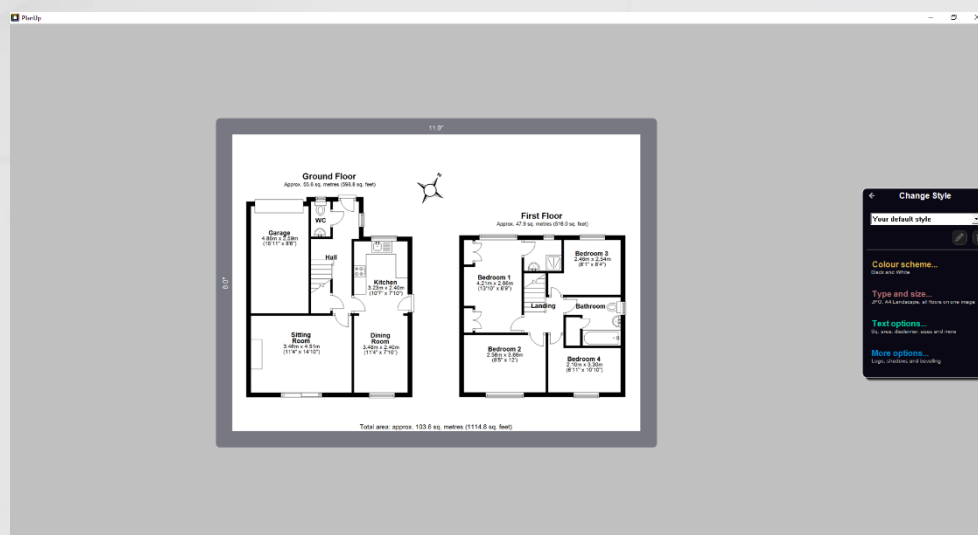
- *Send images and links* to the email you log in with. Simply tap on this and you will see a confirmation on screen when the email has been sent.
- *Download* the available files directly from the software (only available on desktop/laptop). Tapping on this will give you a series of links to download the available files and also give you a PlanUp ID for use with back-office software that allows integration:



- [Create a PhotoPlan](#): add photos to an online viewer (only available on desktop/laptop).
- *View in browser*: opens the online viewer in your web browser.
- [Change Style...](#): allows you to customise how your plan looks and save different styles for different customers.
- [Choose a customer](#): if you want to send the images directly to the customer from PlanUp you can set them up here. This is another way you can save different styles for customers, but this doing this here means you can also send the images via PlanUp to your customer, or even send the customer a link they can use to customise the plan themselves. You can also transfer the plan to their own account if they have an active PlanUp subscription.

## Change Style....

On tapping *Change style...* you will see a screen like this:



You can now:

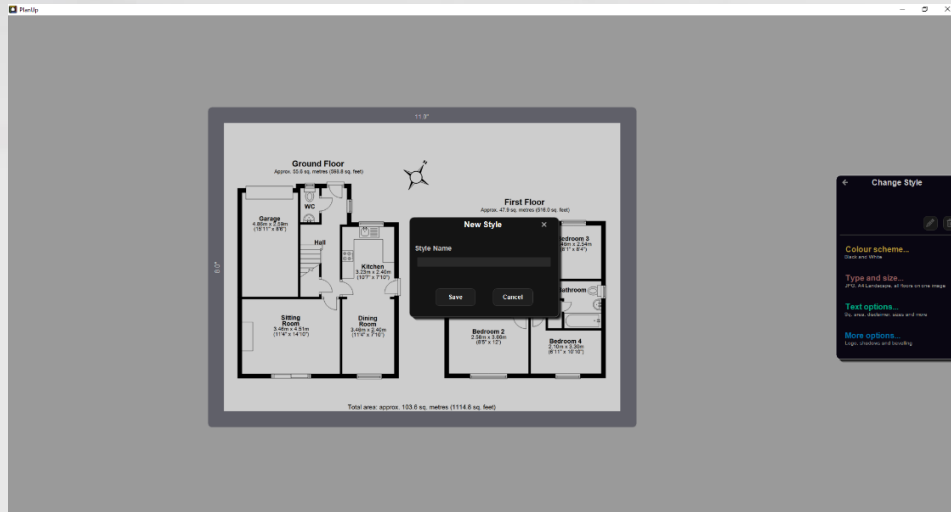
- [Set up new / select from saved styles](#) for different customers/uses.
- Change the [Colour scheme...](#)
- Change the [Type and size...](#) of the image file to be saved.
- Change the [Text options...](#) for what/how it will be displayed.
- Select [More options...](#) to choose from a selection of other available options including adding a logo.

## Set up new / select from saved styles

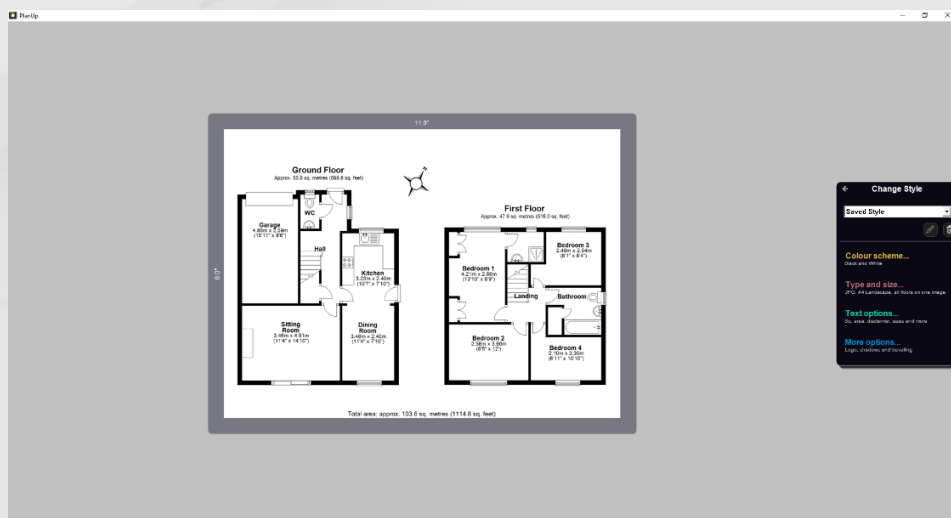
As well as setting your own default style, you can also save different styles for your customers so you can simply select the style to apply the saved settings to plans for that customer in the future.

### New Style

- Tap on the drop-down box (where it will currently say *Your default style*) and select *New style...*
- You will now be prompted to enter a name for the style.



- Once you have entered the style name, tap **Save**. The drop-down box will now have the style name you just created and you can continue to set the style as required.



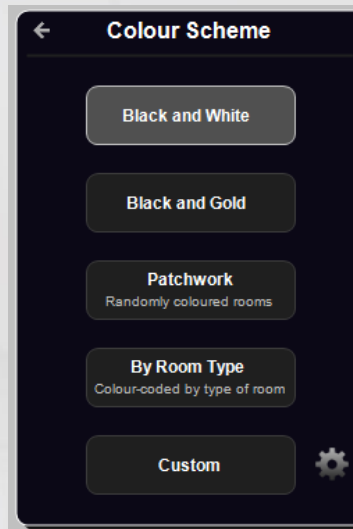
### Select A Saved Style

Simply tap on the drop-down box (where it will currently say *Your default style*) and select the required style.

You will now see the preview change from your default style to the saved style.

### Colour scheme...

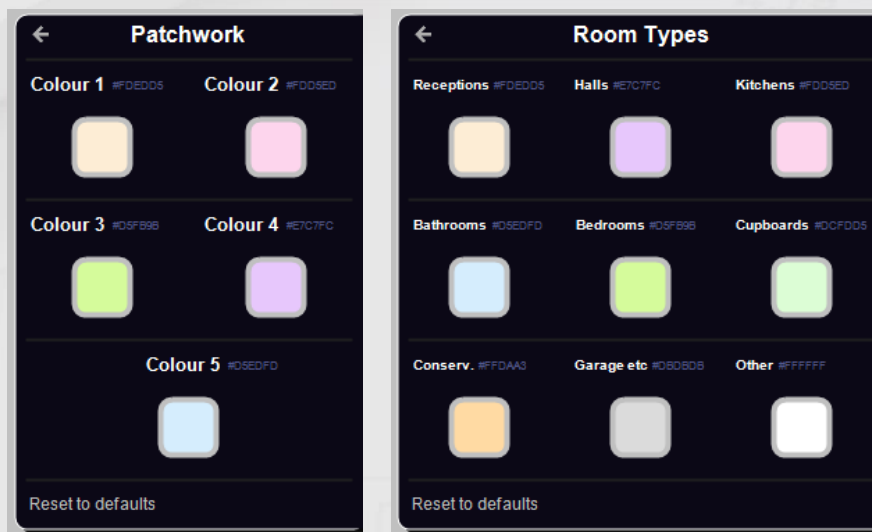
When you tap on *Colour scheme...* the menu will change to look like this:



You can choose between:

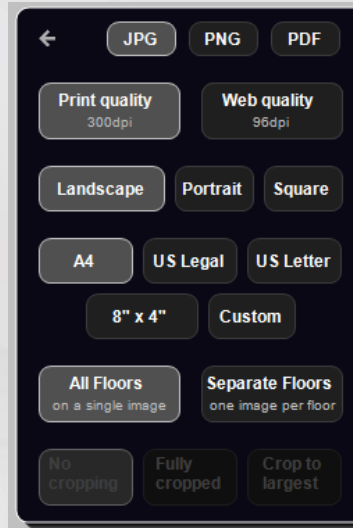
- *Black and White*: Black walls with a white floor.
- *Black and Gold*: Black walls with a gold floor.
- *Patchwork*: Black walls with randomly coloured floors.
- *By Room Type*: Black walls with rooms coloured according to the type of room.
- *Custom*: Allows you to set your own colour for both walls and floor.

When you select *Patchwork* or *By Room Type* you will be given a screen with colour swatches for each grouping. Tapping on the colour swatch allows you to set a custom colour for this group. Alternatively if you have a hex code, you can tap on the hex code next to the group name and enter the code here.



### Type and size...

When you tap on *Type and size...* the menu will change to look like this:

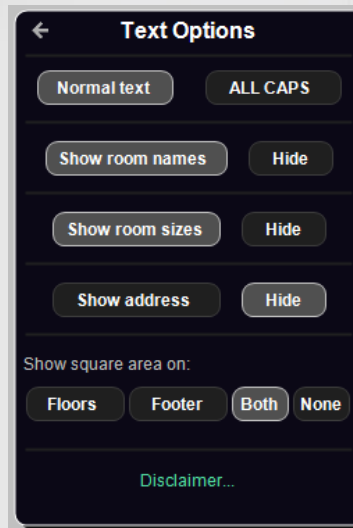


Here you can select:

- The file format (JPG, PNG, or PDF).
- The image quality - print (high res) or web quality (low res).
- Image orientation (landscape, portrait, or square).
- Image size (preset selection available or set your own custom size).
- Whether to have all floors on a single image, or each floor on a separate image.
- If you select to have separate images for each floor, you also have some options available to crop the empty white space from around the smaller floors.

### Text options...

When you tap on *Text options...* the menu will change to look like this:

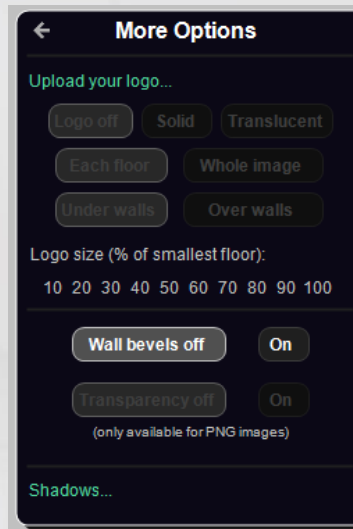


Here you can:

- Set the text to all capitals.
- Show/hide all room names.
- Show/hide all room sizes.
- Show/hide the plan address (first line only).
- Add a disclaimer.

### More options...

When you tap on *More options...* the menu will change to look like this:

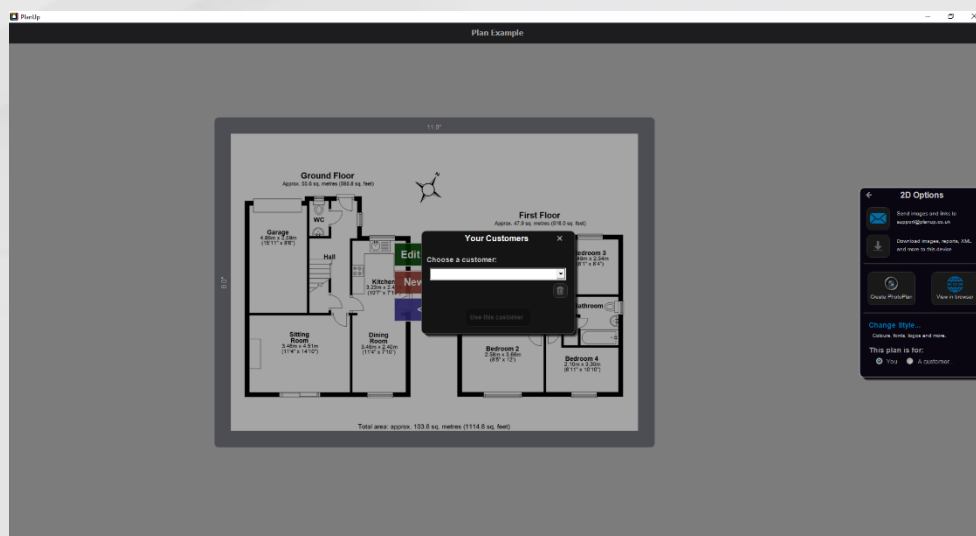


From here you can:

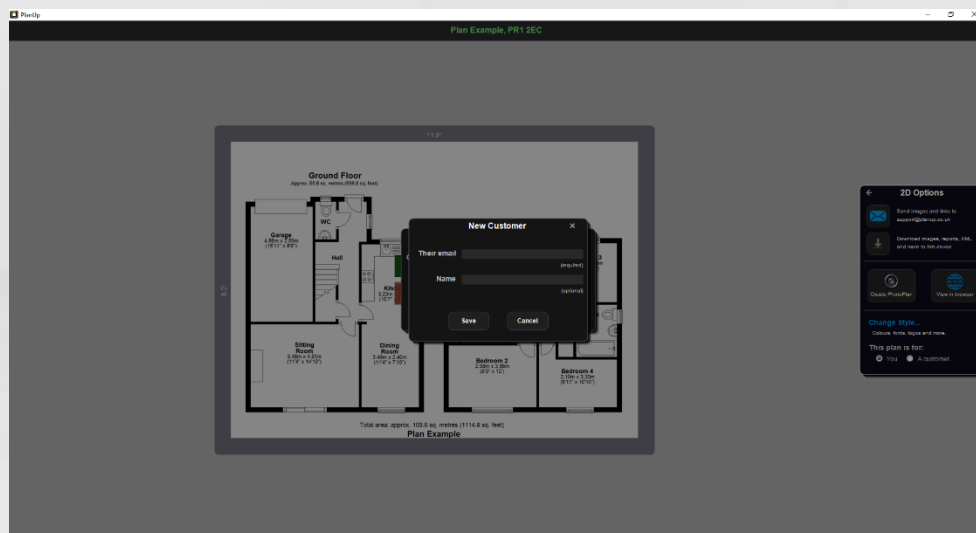
- Upload a logo. Once a logo has been uploaded you can change associated display options.
- Turn wall bevelling on/off (for wall bevelling to show, you will need to have the wall fill and line colours set to be different).
- Make the white surround of the plan transparent (this is only available if you have selected PNG in [Type and size](#)).
- Add shadows to the plan.

## Choose a Customer

Tap on *A customer...* and a pop up will appear asking you to *Choose a customer* from a drop-down list.

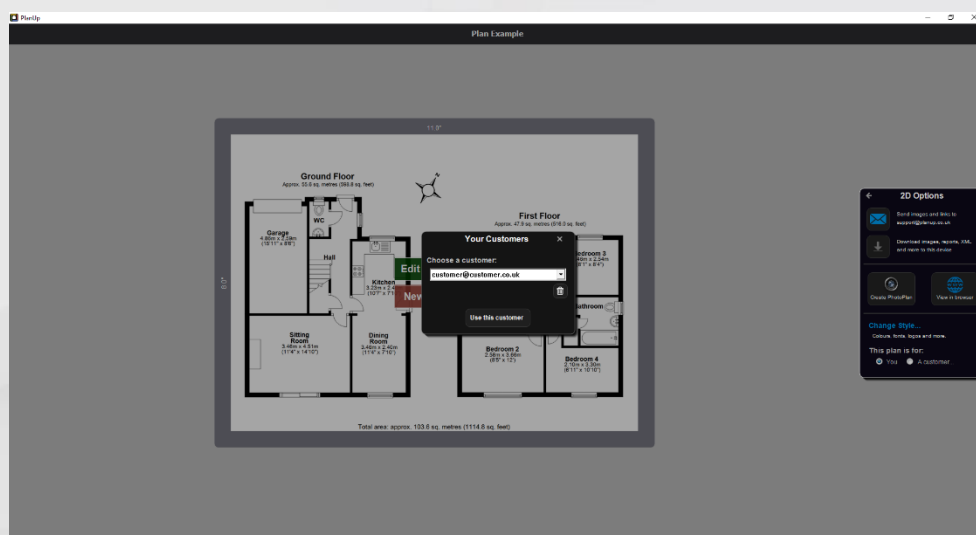


If you have not previously saved any customers or this is a new customer, select *New customer...* and you will then be prompted to enter the email and a name for the customer (the email address is required, the name is optional).

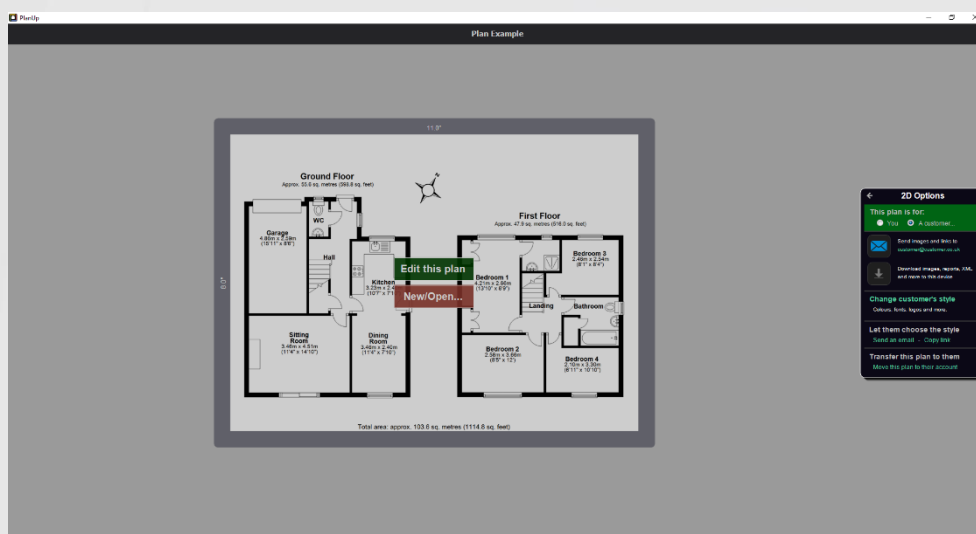


Once you have entered the details, tap **Save**.

If you have saved this customer previously, simply select their email from the drop and then tap *Use this customer*.



You will now see a screen like this:



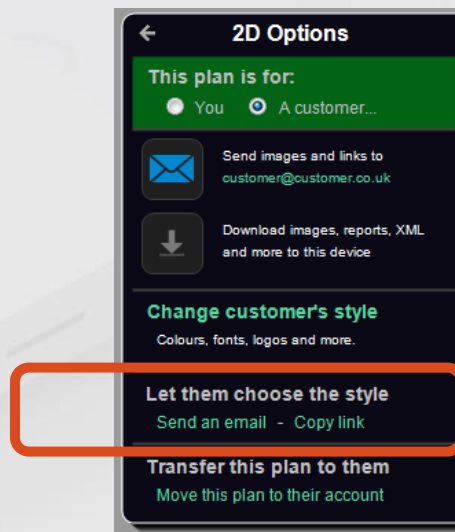
You can now:



- *Send images and links* to other files via email directly to the customer from PlanUp.
- *Download* the files from PlanUp to send on to the customer yourself.
- *Change customer's style*. All of the same options as described previously in [Change Style](#) with the exception of adding new styles. Only one style can be saved on a customer's record.
- [Let them choose the style](#): Send a link to the customer so they can customise how the plan looks themselves. Either *Send an email* with a link via PlanUp (to the email address you saved for the customer), or you can *Copy link* to send in an email yourself.
- [Transfer this plan to them](#): Use this option to send a request to transfer the plan onto your customer's account with us.

## Let your customer choose the style

Once you have chosen your customer, you will see a section in the menu to *Let them choose the style* as highlighted below:



This allows you to send your customer a link so that they can set their own customisations, add their own logo, disclaimer, etc. Two options are available:

- *Send an email*: Sends an email via PlanUp to the email you saved for the customer record with a link to customise the plan as they wish; or
- *Copy link*: This copies the link the customer needs to customise the plan to your clipboard (the same link that is sent via PlanUp using *Send an email* above), so you can paste into an email from yourself rather than PlanUp.

If you use the *Send an email* option, your customer will receive an email like this:



Once your customer has received the email sent from PlanUp or from yourself if you use the copy link option, they simply need to click on the link to be able to customise and save the plans as they wish. Instructions for how they can do this can be found in the document linked below:

[Customer Style and Save Guide](#)

### Transfer this plan to your customer's account

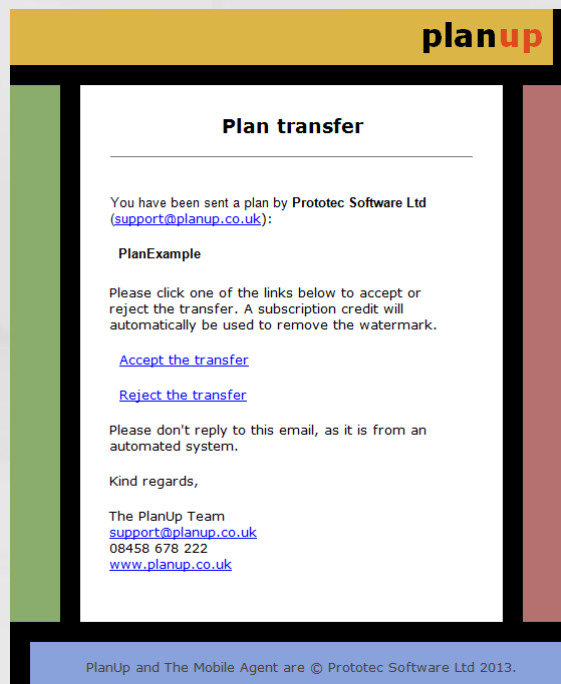
Use this option to send a request to transfer the plan onto your customer's account with us.

**IMPORTANT:**

- *To use this option, your customer must have a monthly subscription with PlanUp as they will be paying for the transferred plan.*
- *Once the plan has been transferred you will not be able to access the plan as it will no longer be on your account.*

If you wish to transfer the plan to your customer's account with us, then tap on *Move this plan to their account*. This will show you a prompt asking you to confirm that you wish to transfer this plan. Once you have tapped on Yes, a message will be displayed saying an email has been sent to your customer's email address – this must be the same email address they use to log in to PlanUp with.

Your customer will receive an email like that below informing them a plan has been drawn by you (stating the plan address and your email address), informing them that if they accept the plan this will be counted towards their monthly allowance.



They will then have two links, one to accept the plan onto their account, and the other to reject it.

If they accept the plan, it will be moved from your account onto theirs (you will no longer be able to access the plan) and they can then continue as normal to save the plan as normal to make any amendments and save the plan as they wish.

If they decline the plan, it will remain on your account and they will not be able to work with the plan – if this was a mistake you will need to start the process again.

## Get 3D

Once the plan has been unlocked you can tap on *Get 3D* to customise and save your 3D images.

Once you have tapped on *Get 3D* you will see a screen like this:



From here you can:

- Change the *Flooring Material*.
- *Render* the 3D image – an email with the image(s) attached will be sent to your log in email when it is complete, you will also then be able to download the image(s) directly from PlanUp.
- Choose *A customer*. This works in the same way as [choosing a customer for 2D plans](#).

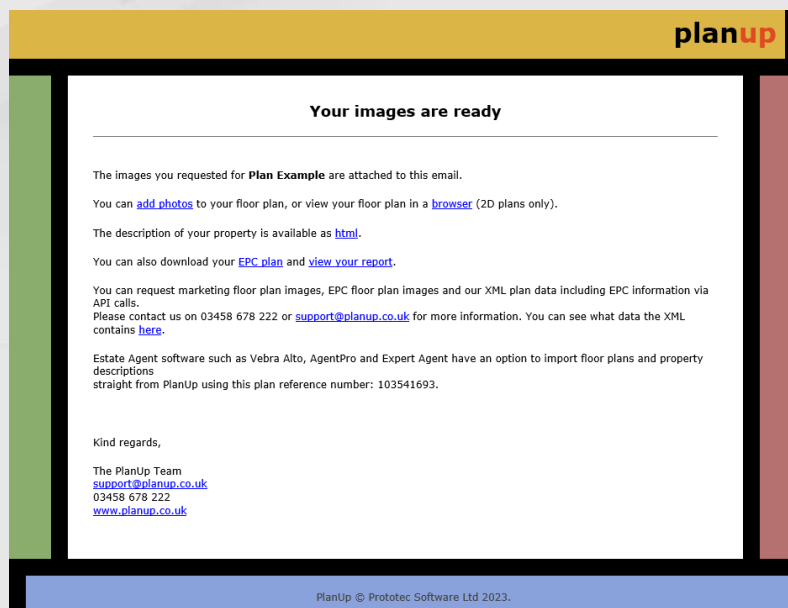
- **Change Style...:** This works in the same way as [changing the style for the 2D plans](#), with the exception that you cannot change the colours as these cannot be changed for 3D plans.

Once the 3D plan is ready, a preview will be available in the white box, all of the options will still be available to adjust as necessary, plus the options to email the images to yourself or download direct from the software (desktop only) as necessary.



## Image Emails and Further Output Types

The email you receive when you request the images to be sent will look like this:

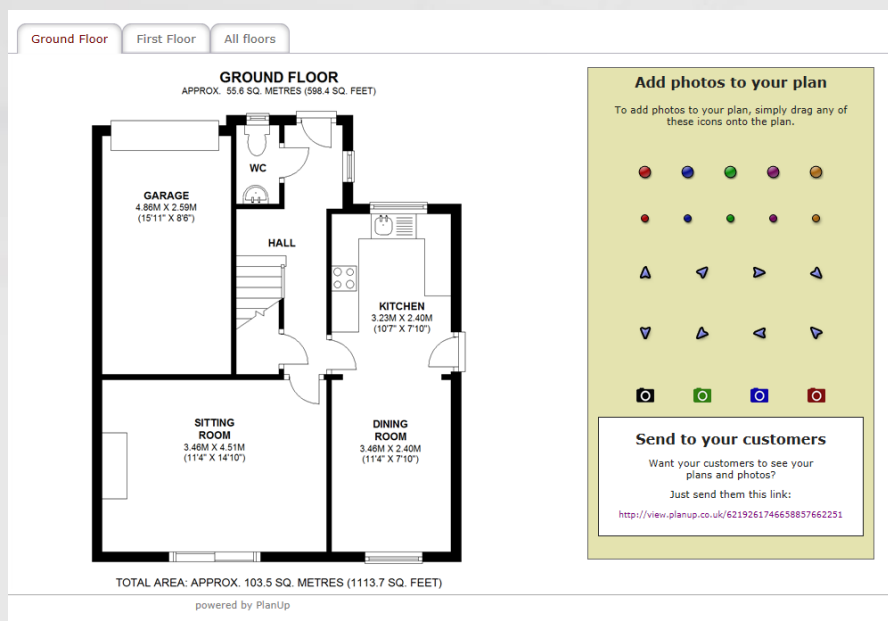


In this email you will see a series of links in the body of the email. These links are for:

- Creating interactive photo plans using the [add photos](#) link.
- Viewing the floorplan in your web browser.
- Viewing the descriptions added in your browser – these can be selected and copied as required.
- Saving EPC plans (only if you use the DEA version).
- Viewing the report of EPC data in a web browser (only if you use the DEA version).
- There is also a plan reference number – this can be used by some back office systems to import information directly from our server.

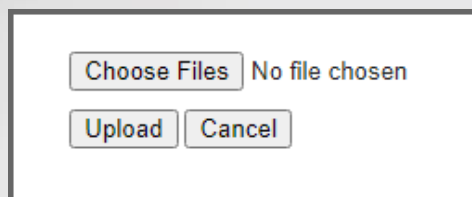
## Interactive Photo Plans

To add photo hotspots you first need to tap *Add Photos* on the email received with the plans attached – this will open a new window with the online viewer displayed and a panel on the right hand side of the window for adding the hotspots as shown below:



**NB:** If you are using a Windows PC/laptop you can get to the Add photos screen using the Add photos button below the Remove watermark / Direct save button when requesting 2D plans.

Select the hotspot you want to use and drag across onto the plan. This will then open the box shown below:



Tap on *Choose files* which will allow you to navigate to the photos that you want to upload – please note only jpegs can be uploaded.

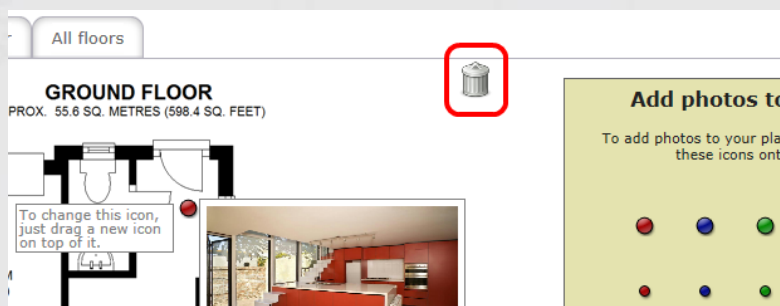
You can upload as many files for a floor at a time as you want to – a hotspot will be added to the right-hand side of the image for you to drag into place when the images have been uploaded.

Once you have selected the file(s) to upload tap *Upload*.

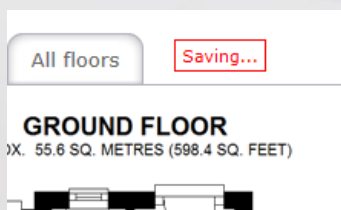
Hotspots can be moved anywhere on the plan by tapping and dragging on the hotspot.

If you need to replace any hotspot markers, select the replacement hotspot and drag and drop onto the marker you want to replace.

Should you need to delete a hotspot, tap and drag the hotspot to the bin which will appear in the top right-hand corner of the plan window when hovering over / tapping on the hotspot as highlighted below:



All changes made are saved as you work on the hotspots – you will see ‘Saving...’ displayed as red text in a red box as illustrated below:










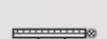






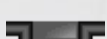








































When you are finished the link to use on your website can be found at the bottom of the hotspot panel or by tapping on the view in browser link in the image email or in PlanUp.

# Appendices




























## Appendix 1: Top Toolbar Reference



Main Toolbar		Sub Menu			
Icon	Item	Icon	Item (shortcut keys)	Icon	Item (shortcut keys)
	Door		Single (D)		Double (D, B)
			Patio (D, P)		Sliding (D, S)
			Opening/Archway (D, O)		Folding (D, F)
			Bi-fold (D, I)	All of these can be created from the same symbol plus more alternatives if required. Once added select the door to open the pop-up menu, here you will see options to change the number of panels on each side.	
			Triple-fold (D, T)		
			Double Bi-fold (D, L)		
			Garage (D, G)		In Arrow (D, A)
	Window		Standard (W)		Bay (W, A)
			Bow (W, O)		Box (W, B)
			Velux/Skylight (W, V)		
	Stairs		<p>Stairs have a second submenu for each stair type (except spiral stairs) for the direction the stairs lead in. Example of second sub menu (straight stairs):</p>		
	Cupboard		Single Door (C)		Double Door (C, D)
			Folding Door (C, F)		Opening/Archway (C, O)
			Sliding Door (C, L)	<b>W</b>	W text label (C, W)
		<b>CPD</b>	CPD text label (C, T)	<b>C</b>	C text label (C, U)

	Radiator (text naming each symbol is visible on the menu)	 Single (R)	 Double (R, D)
		 Storage Heater (R, S)	 Air Vent (R, A)
		 Heated Towel Rail (R, H)	 Electric Heater (R, E)
		 Water / Oil Filled Radiator (R, W)	 Hot Water Cylinder
		 Water Cylinder	 Boiler
	Fireplace	 Fireplace Hearth (F)	 Fireplace with Hearth (F, C)
		 Fireplace no Hearth (F, N)	 FP text label (F, T)
	Toilet and basins	 Toilet (T)	 Toilet – simple (T,2)
		 Bidet (T, D)	
		 Standard (B), small (B, 1)	 Square (B, S), small (B, 2)
		 Oval (B, O), small (B, 3)	 Corner (B, C), small (B, 4)
	Baths and Showers	 Standard shower (S)	 Corner shower (S, C)
		 Corner bath (A, C)	 Standard bath (A)
		 Double end bath (A, D)	 Oval bath (A, O)
		 P-shaped bath (A, P)	
	Sinks and Worktops	 Sink (K)	 Double sink (K, D)
		 Sink with ½ bowl (K, R)	 Double sink with ½ bowls (K, N)
		 Butler sink (K, B)	 Double Butler sink (K, U)
		 Worktop (K,W)	 Space (K, S)
	Hobs	 Hob – simple (H)	 Five ring hob - simple (H, F)
		 Hob (H, 4)	 Five ring hob (H, 5)
		 Aga (H, A)	 5 oven Aga (H, O)
	Extras	 Compass	 Add additional Room Title (M, R)
		 Text box/note (M, T)	 Freehand wall (M, W)
		 Measurement Arrow (M)	 Line/Arrow (M, L)



	Shapes	 ...  ...  ...  ...		A selection of shapes (oval, circular, triangular, and rectangular) with options for white or black fill, colour, line style.	
		 PRG	Programmer (P)	 RSt	Room stats (P, S)
		 LHT	Loft Hatch (P, L)	 UFHM	UFHM (P, U)
		 FLU	Boiler flue (P, F)	 BLR	Boiler (P, B)
 EPC	EPC Menu	 WCyl	Cylinder (P, C)	 GMtr	Gas meter (P, G)
		 EMtr	Electric meter (P, E)	 SCck	Stop cock (P, K)
		 CONS	Consumer unit (P, N)	 GSHP	Ground source heat pump (P, D)
		 ASHP	Air source heat pump (P, A)		
 FIRE	Fire Safety	 FIRE EXIT	Fire Exit	 F/E	Foam Extinguishers
		 F/B	Fire Blanket	 S/D	Smoke Detector
		 H/D	Heat Detector	 W/E	Water Extinguishers
		 D/E	Dry Extinguishers		

## Appendix 2: Bottom Toolbar Reference



Icon	Function (shortcut key – Windows devices only)
	Back – all unsaved data will be lost
	Undo
	Save – this only updates the auto-save and does not affect the plan that
	Change the address for this property
	Help – tapping on this will take you to our <a href="#">support page</a> . On desktop/laptop hovering over this button will display the version number installed
	Rotate plan – displays four further buttons on a submenu; rotate whole property (green) and rotate single floor (blue) both clockwise and anti-clockwise
	Flip plan left-to-right – displays two further buttons on a submenu; flip whole plan (green) and flip just the current floor (blue)
	Flip plan top-to-bottom – displays two further buttons on a submenu; flip whole plan (green) and flip just the current floor (blue)
	Swap between standard view and EPC view (E)
	Go down to the next / create a floor below
	Go up to the next / create a floor above
	Save progress and go to save required files

## Further Help and Information

If you require any further help or information, please see our support page and YouTube channel:

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

[PlanUp Floor Plan Software - YouTube](#)

Here you will find links to an online version of this document, some training videos and some FAQs.