PlanUp

Style and Save
Link Guide

Contents

Welcome to PlanUp

This document will guide you through customising and saving any floor plans you have been sent a Style and Save link for by your contractor.

Style and Save Email

When your contractor has finished a plan for you he will send you a Style and Save link. This will arrive in an email similar to the one below:
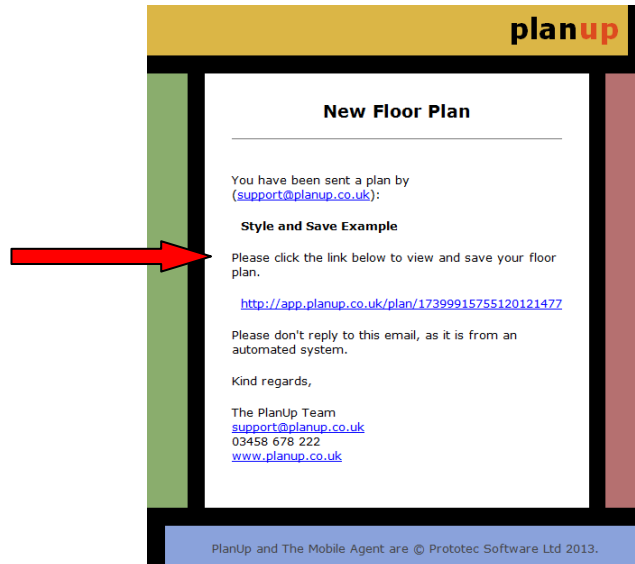
Please click the main link in your email - as indicated in the example above - to begin.

The Main Request Screen

On clicking the link in the email a page similar to the following will open in your web browser:

In this window you will see

- In the green panel on the left you will see a preview of the plan you have been sent (this will be low resolution and will not reflect the quality of the final image).

- In the blue panel at the bottom of the screen:

- A link that will take you to a list of all of the plans you have been sent from this contractor using PlanUp.

- An *amend titles and sizes* option – this allows you to alter text to your in house standards/requirements rather than having to wait for the contractor to be available to do it.

- In the red panel on the right:

  - *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 for the plan.

  NB: *The* Copy *and* Delete *buttons though visible will do nothing from this screen.*

Amend Titles and Sizes

There may be occasions when the contractor perhaps hasn't used your in-house terminology or perhaps you wanted to put your own measurements onto a plan rather than what is currently appearing. For example there might be measurements showing including wardrobes in a bedroom but you don't want them included.

To use this feature:

- Click where it says *amend titles and sizes* in the blue panel – this will open a screen listing all of the rooms and their associated measurements:
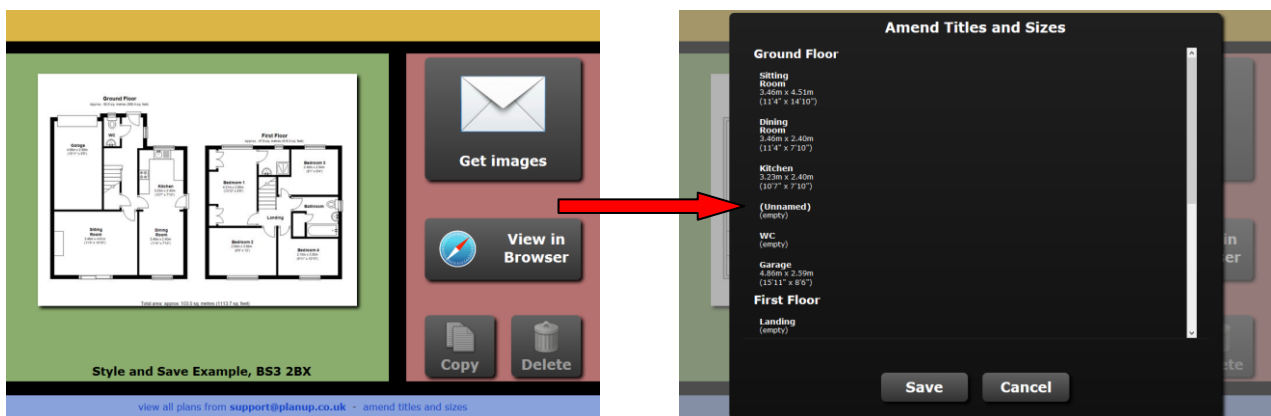
- You can now select one of the rooms to make any necessary adjustments. Selecting a room will open a window allowing the text to be altered:
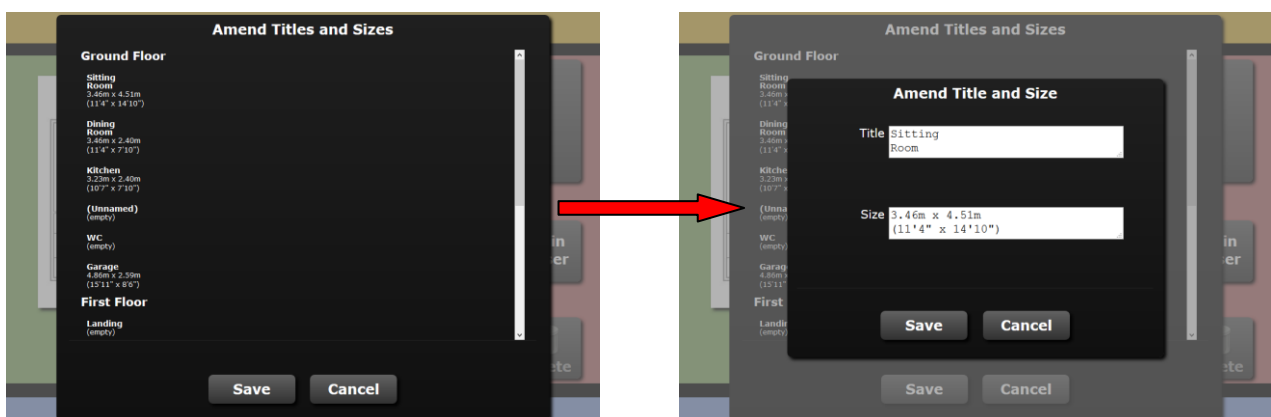

- When making amendments the original text will be shown with the option to reset the text:
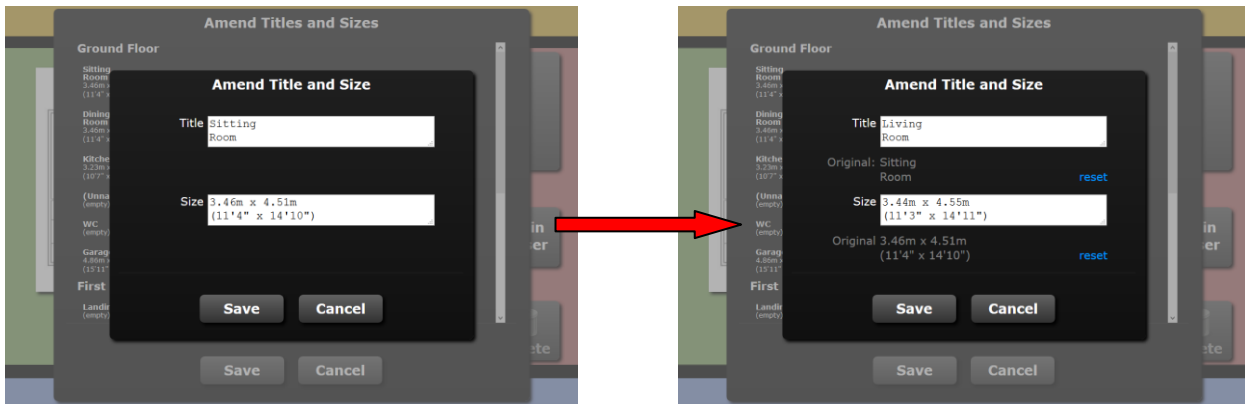
- Tap *Save* when the changes are complete to return to the list and then when alterations are complete tap *Save* again to return to the main screen.

- Any alterations made will appear on the preview and you can now proceed to get images or any further output you require.

How to Get Images

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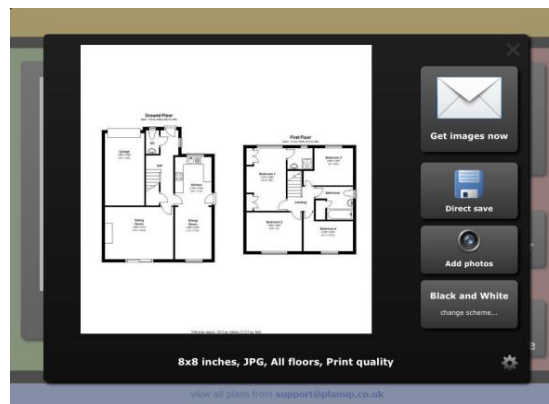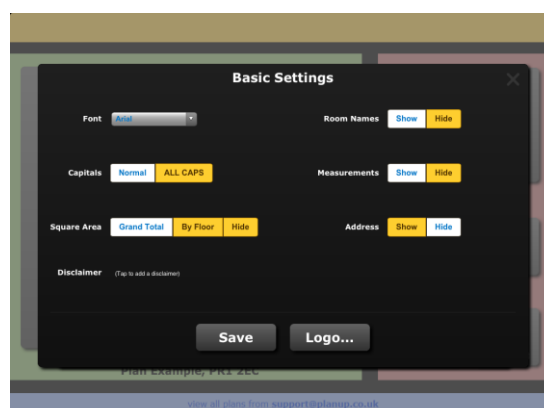

From here proceed as follows:

Basic Settings: Text Settings and Logo Upload

First customise what text to show and how. You can also upload a logo to appear on the plans.

- To change the text options or upload a logo tap on the cog wheel towards the bottom right corner – this will open the screen shown below:

- From here you can:

  o Change the font

  o Choose whether text is to be all capitals

  o Choose whether you want the square area to be showing

  o Show or hide the room names

  o Show or hide the room measurements

  o Show or hide the address

  o Add a disclaimer – simply tap where it says *tap to add a disclaimer* and enter required text. This will then appear on the bottom of the image

  o Upload a logo – uploading a logo can only be done on a Windows or Mac device. To upload a logo:

    ▪ Tap *Logo...*
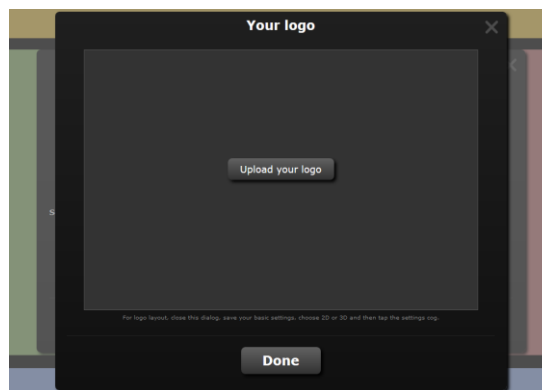
    ▪ Then tap *Upload your logo*

    ▪ Use the explorer window that opens to select the logo to upload and tap on *Open*

   ▪ The logo will then upload and the screen will update to look something like this:
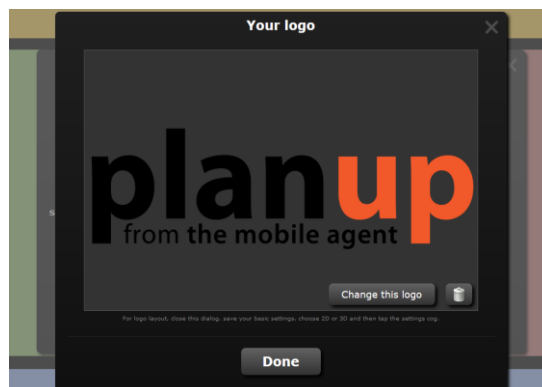
    ▪ Settings for the logo are changed at a later date as per the message you will see at the bottom of the logo preview

- Select the options/upload as required and tap *Save* to return to the previous screen.

Now choose if you want 2D or 3D plans by tapping on the relevant button.
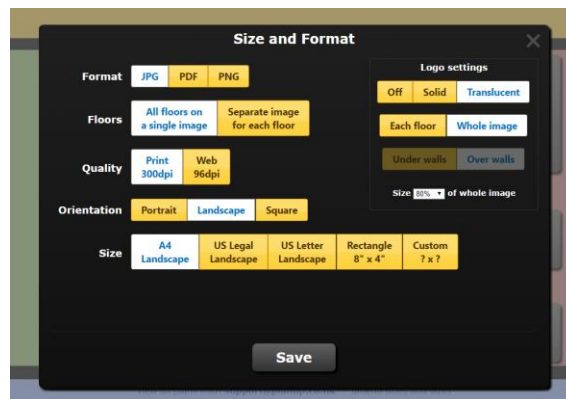
2D Plans

Tap on the 2D button.
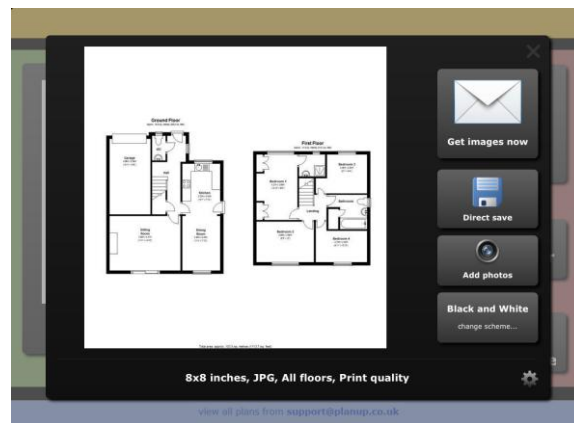
Change Image Size and Format, and Logo Settings

The image size to be requested is detailed underneath the preview of the plan.

If you wish to change the selected image size/type:

- Tap on the cog wheel to the right hand side.

- As in the screen shot above from here you can change:
    - the format of the image (JPG, PNG, or PDF)

        NB: if you require WMFs you will need to request Web Quality (96dpi) images and a link will be available in the email sent

    - the number of images – a single image or an image per floor
    - the quality- print or web
    - the orientation – Portrait, landscape, square
    - the size – from a number of preset suggestions or a custom size
    - the settings for use on the logo:
        - Off (not appearing), Solid, Translucent
        - Appearing across each floor or the whole image
        - Under the walls or over walls
        - Size of the logo as a percentage of the smallest floor of the plan
- Once selected as required tap on *Save* to return to the previous screen.

Customisations

A brief description of the customisations (colours etc) as shown in the preview can be seen on the lower right hand side. If you want to change the customisations:

- Tap on the button where it says *change style...*
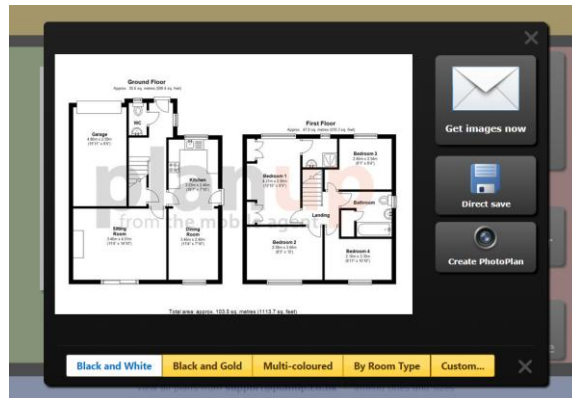
- You will have some quick options to choose from and a *Custom...* button.
- If you tap on the *Custom*... you can:

- o Change the floor colour (*Fill colour*)
- o Change the wall fill and outline colour
- o Change the item colour i.e. change the colour of items such as toilets, sinks etc
- o Add a bevelling effect to the walls – the line and fill colours need to be different for this to work
- o Add shadows to walls, items, and/or text
- o Select options as required tap on *Save* to return to the previous screen
- o **NB: The colour wheel and shade swatch is only visible when you have selected a custom colour option.**
- The preview will update to show the style you select.

Should you wish to check the image size being requested again tap on the cross at the right hand side of the style buttons

When you are happy with the selections made tap on *Get images now*

You will see a preparing email screen which will be replaced with a message saying the email has been sent. When you tap on OK you will be taken back to the <u>main request screen</u>.
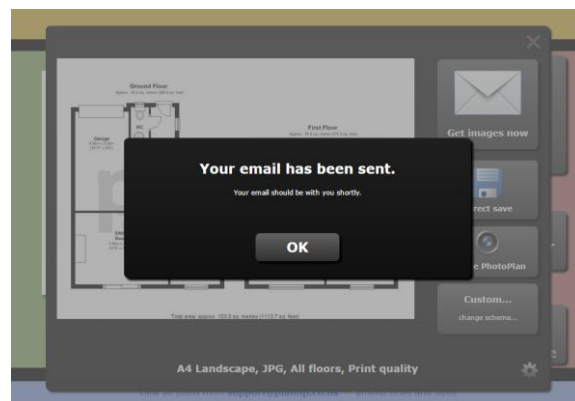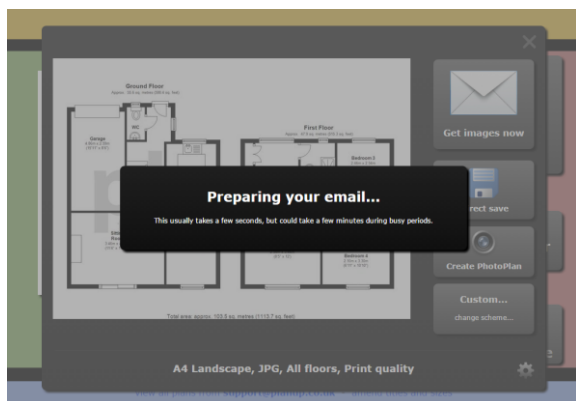
You will soon receive an email(s) with the requested images attached as well as further output available in the body of the email.

Save Directly From PlanUp

If you want to save the images directly from PlanUp there is a *Direct save* button available directly below *Get images now* (Windows and Mac devices only).

Tapping this will give you links on screen to download the various files similar to the below:
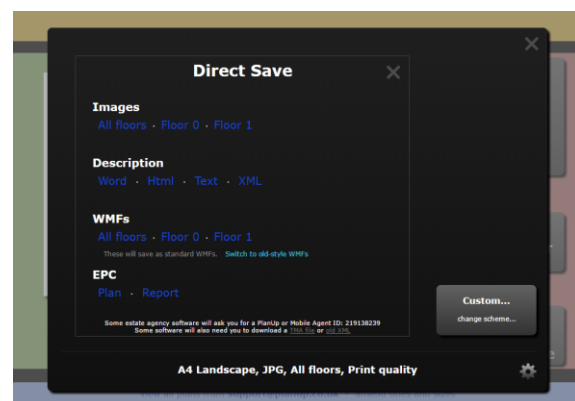
As well as images and descriptions you will find the option to save:

- WMF images as required for some older back office systems.
- A TMA file – this is sometimes required by some older back office systems to import the image and description files.

There is also a unique plan reference number which some back office systems can use to request information directly from our server to save you needing to save the files yourself.
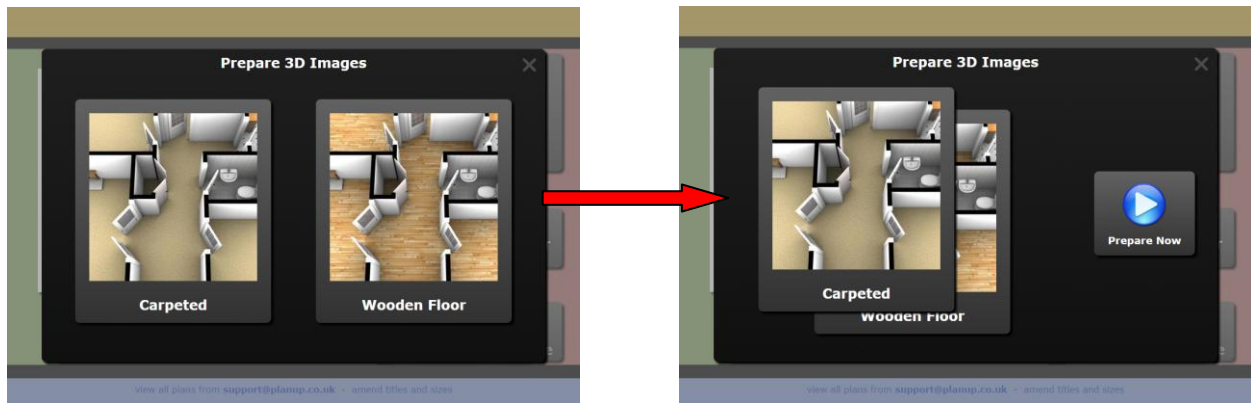
All customisations are still performed in the same manner as before.
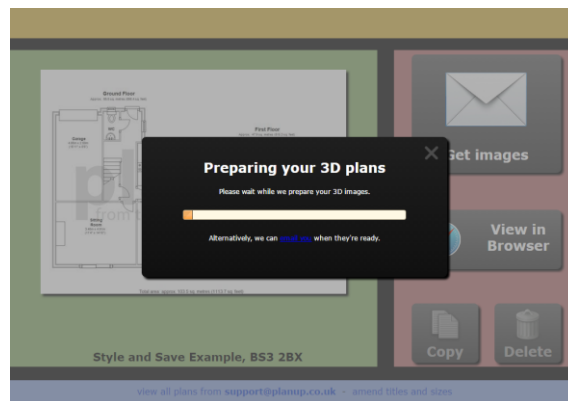
3D Plans

Tap the 3D button.

You will now be given the choice of selecting a wooden or carpeted finish for the floors – select as appropriate.

You will need to generate a 3D image before you can choose the size to be saved. Tap on *Prepare Now* to generate the 3D image.

You will now see a progress bar with the option to request an email to be sent when the image is ready instead of waiting. If you do wait the screen will refresh when the 3D image is ready.

Once the 3D image has been generated the screen will look very similar to the screen for saving 2D Plans.
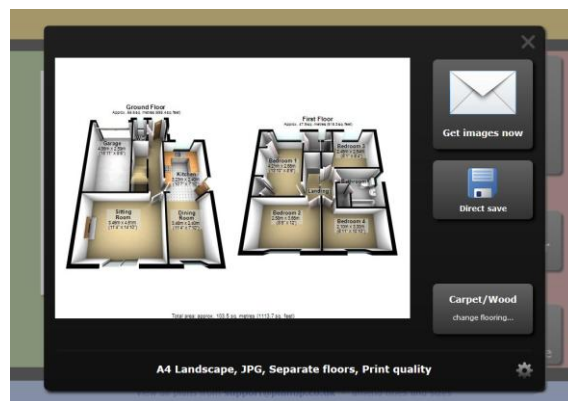
Change Image Size and Format

The image size and format to be requested is detailed underneath the 3D preview. You can Change Image Size and Format of the 3D plans in the same way as you do for 2D plans.

NB: *3D images are only available in jpg and pdf formats.*

Once you have selected the image size and format tap on *Get images now.*

You will see a preparing email screen which will explain the email will be sent when the 3D image(s) has been generated. When you tap on OK you will be taken back to the plan home screen.

You will soon receive an email with the requested image(s) attached as well as further output available in the body of the email.

Image Emails and Further Output Types

When you receive the email after requesting the images you will see in the body of the email are a series of links. These links are for:

- Creating interactive photo plans using the add photos link.

- Viewing the floorplan in your web browser.

- Saving the descriptions as either a word, html, text, or xml file.

- Saving EPC plans (Domestic Energy Assessors only).

- Viewing the report of EPC data in a web browser (Domestic Energy Assessors only).

Interactive Photo Plans

To add photo hotspots you first need to tap 'Add Photos' – 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:
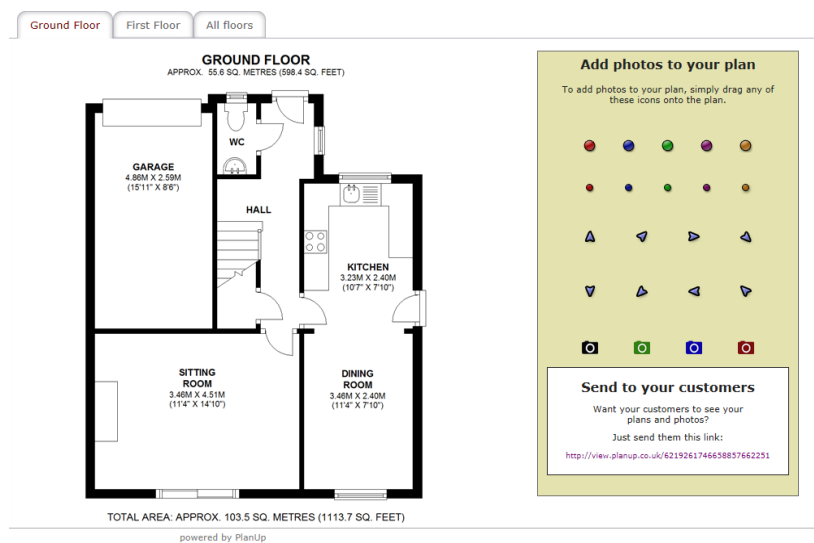
Select the hotspot you want to use and drag across onto the plan. This will then open the box shown below:
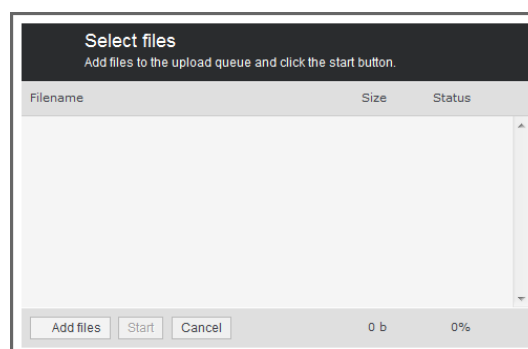
Tap on 'Add files' which will allow you to navigate to the photos that you want to upload – please note only jpegs can be uploaded.

You can upload as many files 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 to upload tap 'Start' and the photos will upload showing you the progress.

Hotspots can be moved anywhere on 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:
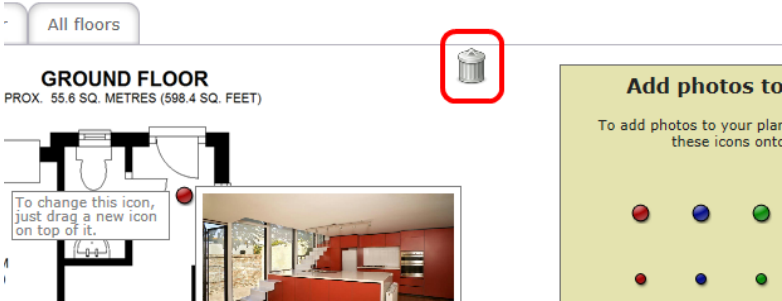
All changes made are saved as you work on the hotspots – you will see 'Saving...' displayed as red text in a red box as illustrated below:
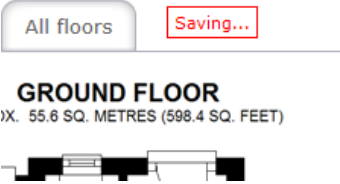
When you are finished the link to use on your website can be found at the bottom of the hotspot panel or by tapping on the view in browser link in the image email or in PlanUp.