

PlanWell Enterprise

The PlanWell service is simple to use, and its ecommerce functions are likely to be familiar. You don't need any special tools or software to use it; just a current Microsoft Internet browser.

This document will discuss all options potentially available in PlanWell Enterprise. It is important to note, depending on your specific user permissions and preferences, options discussed in this user guide may or may not be visible to you.

Finding a PlanWell Provider Near You

You may access PlanWell from your reprographer's website by first typing in the Web address for the home page of your reprographer. Click on the PlanWell link provided on that site to access PlanWell's log in page. If you aren't currently working with a PlanWell provider, a list of providers in your area can be located at www.planwell.com.

By clicking on [Find a PlanWell Location Near You], you will be able to search by zip code, state or country.



Accessing PlanWell

From the PlanWell homepage, you will have three different project access points – Login to Your Account, Guest Access and Public Planroom.

PLANWELL ENTERPRISE TRAINING & SUPPORT

PlanWell EnterpriseSM
Today's standard in online planrooms

Support Info
Searching for Support? Find support here!

User Guide
Need the User Guide? Download it here! (PDF)

FAQ
Got PlanWell Questions? Find your answers here.

DEMO
Click here to view a demo of how PlanWell works.

PLANWELL.COM

New Version !

- » Release Notes
- » What do PlanWell Applications do?
- » Who uses PlanWell Applications, and for what?
- » PlanWell Features
- » PlanWell Workflow
- » PlanWell Security

How Does PlanWell Work?

» Watch the Demo

LATEST PLANWELL STATISTICS

Users	:3,564,790	Orders	:3,545,122
Projects	:323,160	Files	:40,848,729

Visitors : 4,451,785

GOT QUESTIONS? GET SOME ANSWERS!

- » Show me how to improve my online document management system
- » Show me how to improve my invitation-to-bid workflow
- » Show me how to improve my online planroom

EWO Home | Contact Us | User Agreement | Privacy Policy | Library Software | E-ARC.com | Bookmark Us

A Service of American Reprographics Company

PlanWell Enterprise Home Page

Login to Your Account –

Each company that has projects in PlanWell has its own independent PlanWell planroom. To enter that planroom, you will use the “Login to Your Account” to access point and enter your username and password.

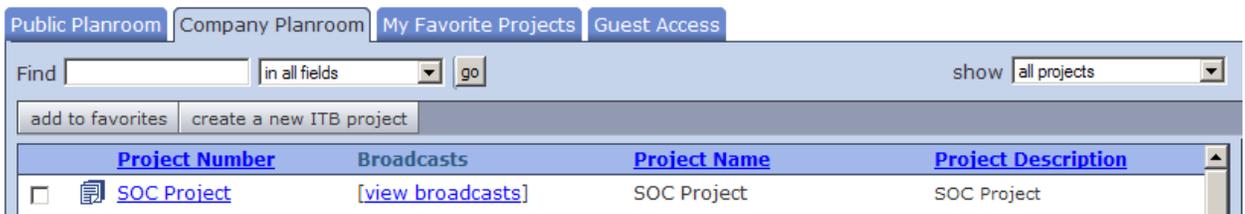
Note: Also in the “Login to Your Account,” employees who have forgotten their password or who have not yet been provided with a username and password are provided with options to retrieve the password or register.

After logging into the company planroom, all company projects will be listed. You may quickly view project documents and details by clicking on the project number. Project specific

passwords are recommended on all private projects. After clicking on the project number, you will be prompted to enter this project specific password. Project documents and details will only be viewable by those entering the correct password.

HINT: If you choose, you may allow certain employees to enter the project without entering this password, easing the process for those entering the project often. All other employees, as well as those individuals you invite to view the project, can be required to enter the project password. Your reprographer will assist you by making these settings.

As the number of projects in your company planroom grows, you may find it more time consuming to find the desired project. PlanWell offers a number of sorting and filtering options.



Find – You may locate a project quickly by typing in search criteria in the find field. The criteria can be the project number, project name or project description. You may also type in a portion of any of those options. After typing in the information, PlanWell will by default search for the information in all fields. You may speed the search up by using the dropdown box to indicate which field PlanWell should search in and choose [Go]. Only those projects matching the search information will be presented in the project list.

Add to Favorites – If there are projects that you access often, rather than completing a search every time, you can add them into a “favorites” section. Identify the desired project(s) and place a check in the box next to it. Click on [Add to Favorites]. You may now view and access that project by switching to the “My Favorite Projects” tab.

Projects added into your favorites section will remain there until you remove them. This ensures that you can quickly access those projects every time you log into PlanWell. You may remove a project from your favorites list by placing a check in the box next to the project and choosing [Remove from Favorites]. This project will remain in PlanWell and be accessible from the main projects window but will no longer be listed in your “My Favorite Projects” tab.

Column Sort – You may change the order in which projects are listed by choosing to sort the projects by project number, name or description. Click on the column header for

any of these fields and the projects will immediately be reorganized accordingly. This sort will exist during this current session only; the next time you log in, the projects will be shown in their original order.

Show – On the far right is an option to select which types of projects are showing. Your options are “all projects,” “projects with ITB only” or “projects without ITB only.” ITB stands for BidCaster, an invitation to bid tool integrated into PlanWell. This option allows you to quickly reduce your project list by those with BidCaster activity or those without.

Guest Access -

This access point is often used by sub-contractors or other users who need to be brought into one specific project rather than a full company planroom. Users must enter the project number, project password and select [Go] to enter the project.

After entering the required information, the user may view and, if desired, order documents following the selection processes outlined below. You may adjust the different ordering methods for these guest access individuals. For example, you may allow them to add entire issues or disciplines to their cart, or you may limit all orders to packages only; you may allow them to request digital download of documents, or hard copy print orders only. You will work with your reprographer to set the permissions accordingly for those entering through this access point.

Guest Access users do not need to be registered to enter the project and view the documents. It is only at the point of placing an order will they be prompted for PlanWell login information. This information is required to ensure proper delivery and billing. The registration process has been seamlessly incorporated into the ordering process; making it easy and convenient for these users.

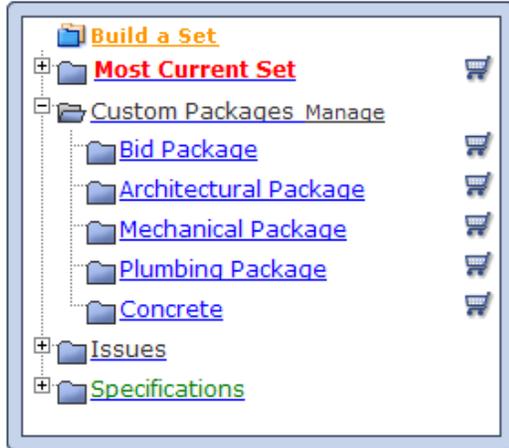
Public Planroom –

All public projects open for bid that are hosted by your reprographer can be found by selecting [Go] from the Public Planroom access point. Users will click on the project name to view the drawings and, if desired, begin the ordering process. Public projects are available to anyone and will never require a project password.

It is only at the point of placing an order that those in a public project will be prompted for PlanWell login information. As mentioned above, this information is required to ensure proper delivery and billing. The registration process has been seamlessly incorporated into the ordering process.

Selecting Documents to view in PlanWell:

Regardless of the method for accessing a project, the document viewing and ordering process is the same.

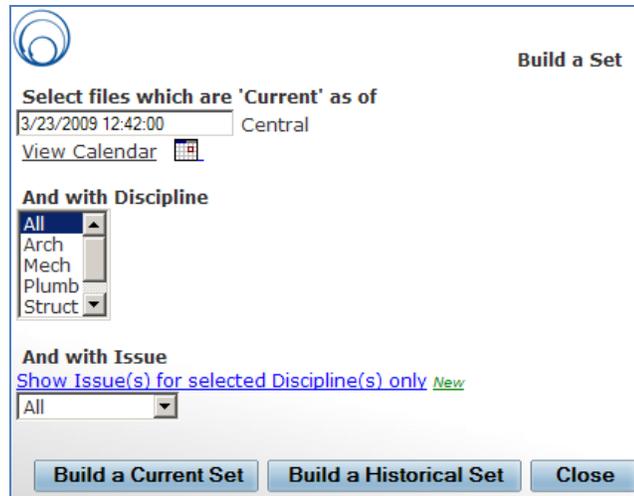


After entering a project, you will be presented with a number of options from which you can select the documents you would like to view and potentially order. This format and underlying functionality allows you to quickly select just those documents you are interested in; PlanWell will automatically identify the correct documents that match your selections. Understanding each of these viewing options will help you to best select the option to meet your viewing needs and ease the ordering process.

As mentioned at the beginning of this document, the options discussed and shown here may be different than the options you see based on your preferences. Additionally, you may choose to restrict how your employees and/or guest access users select and potentially order documents. For example, you may choose to disallow selecting single sheets or single disciplines. Your reprographer will work with you to help determine the options you would like available.

Build a Set –

The build a set option allows you to identify documents based on date, discipline, issue or all of the above. Within your specified criteria you may further choose to build a current set or a historical set. A current set will return the documents which were current for the criteria you specified on the date you selected while a historical set will return every drawing that was issued prior to the date chosen. All matching documents will automatically be identified and listed in the item browser window.

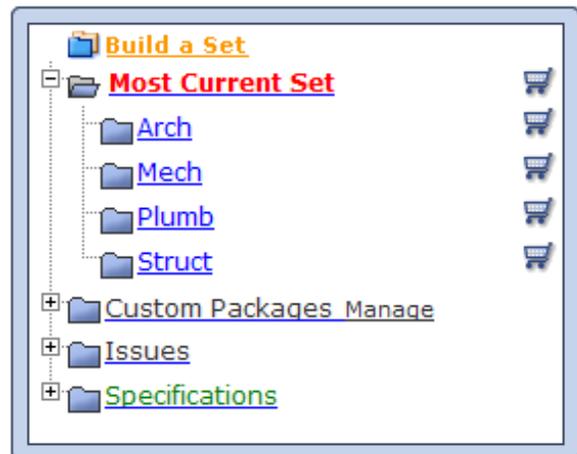


Most Current Set –

As new issues are added into your project, PlanWell automatically goes through all of your issues to gather the most current version of every sheet. The Most Current Set option provides you with one click access to all of these current documents or the current documents to an individual discipline(s).

To view all current documents, simply click on “Most Current Set.” PlanWell will automatically identify all current documents and list them in the item browser window.

To instead view the most current documents from an individual discipline, click on the [+] sign next to Most Current Set. All disciplines will be listed. By clicking on the discipline name, the current versions will be listed in the item browser window. Please note, when using this option you will only be able to view one discipline at a time in the browser window. If you would like to view multiple disciplines at the same time, it is recommended you use the Build a Set or Custom Packages options.



Custom Packages –

As the name implies, custom packages are customizable groups – or packages – of documents. These packages may be created from documents included in any issue or discipline. Information on creating these packages is covered later in this document.

By clicking on a custom package name, all appropriate documents will be listed in the item browser window.

Issues –

By clicking on the [+] next to “Issues,” you will be presented with a list of all issues from the project. You may view an entire issue by clicking on the issue name. You may also further narrow down your viewing options by clicking on the issue name and then clicking on the desired discipline or sheet. As with the other options, all documents from the issue and/or discipline will be listed in the item browser window.

Specifications –

Your specifications included in PlanWell are often kept in a separate area for viewing or ordering. You will work with your reprographer to determine the best method for posting these documents. For example, some choose to post entire specification books as a single document while others choose to break them into divisions; some choose to make them viewable in PlanWell while others choose to hide the content until the specification book is ordered.

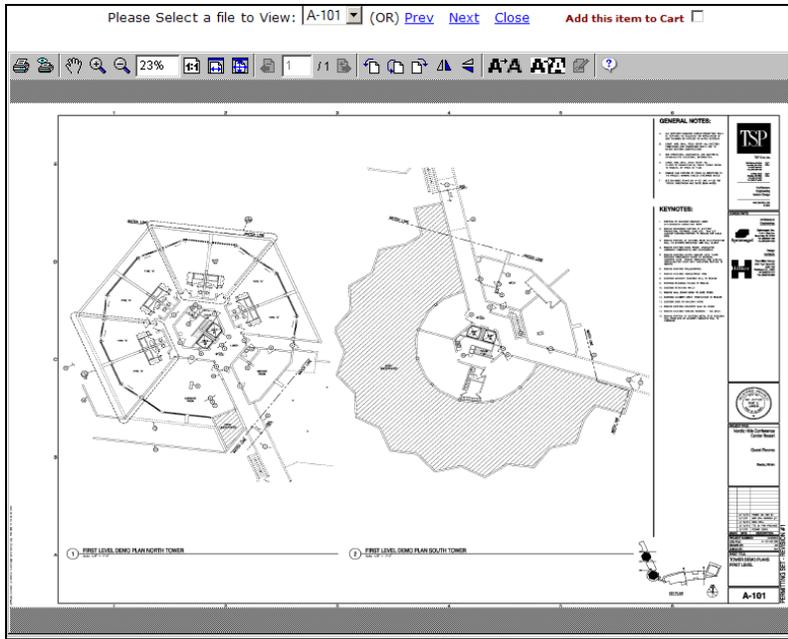
As you click on the [+] button(s) in the Specifications option, you will have the ability to select these specifications based on the methods you decided upon.

Viewing Documents and Populating the Shopping Cart

Regardless of the method used to select documents, all appropriate documents will be listed in the item browser window. You will be able to view a thumbnail image of the document by clicking on the sheet number.

Sheet No.		Issue	Issue Date
A-101		Addenda 3	3/16/2009
A-102		Addenda 3	3/16/2009
A-103		Addenda 3	3/16/2009
A-104		Addenda 3	3/16/2009

Item Browser Window



Viewer Window

From the viewer window, you can easily move forward and backward through all documents listed in the item browser window by using the “Prev” and “Next” links.

To further ease the ordering process, you can add a document into your shopping card from the viewer window by placing a check in the box next to “Add this item to Cart.”

Populating the Shopping Cart

Documents can be added to your shopping cart by clicking on the shopping cart icon next to the desired items. You may order a bundle of documents by clicking on the shopping cart icon within the selection options window or order individual sheet(s) by clicking on the shopping cart icon next to the document name in the item browser window.

Sheet No.	Issue	Issue Date
A-101	Addenda 3	3/16/2009
A-102	Addenda 3	3/16/2009
A-103	Addenda 3	3/16/2009
A-104	Addenda 3	3/16/2009
A-105	Addenda 3	3/16/2009
A-106	Addenda 3	3/16/2009
A-107	Addenda 3	3/16/2009
A-108	Addenda 3	3/16/2009
M-111	Addenda 3	3/16/2009
M-112	Addenda 3	3/16/2009
M-113	Addenda 3	3/16/2009
M-114	Addenda 3	3/16/2009

Drawing Count: 1 to 25 of 25 [Learn more about e-Takeoff](#)

As you add items to your cart, the count in the Shopping Cart Items tab will increase accordingly. By clicking on this tab, you will be able to review your current shopping cart. Bundles or sets of documents will be listed as one line item, with the number of sheets in that bundle or set listed while documents selected individually will be listed as individual line items.

You may remove any line item by clicking in the checkbox next to the document and choosing the “Delete Selected File(s) from Shopping Cart” icon. You may also completely clear your shopping cart by choosing the “Clear the Shopping Cart” icon.

Item Browser		Shopping Cart (3) Items				
Set/Sheet Name	Issue	Discipline	Date	Size	No. of Sheets	 
1.  Current Set	-ALL-	-ALL-	3/23/2009 13:13:00	30X42	25	<input type="checkbox"/>
2.  A-101(Bid Set)	Bid Set	Arch	-NA-	30X42	1	<input type="checkbox"/>
3.  A-102(Bid Set)	Bid Set	Arch	-NA-	30X42	1	<input type="checkbox"/>

Placing Orders in PlanWell

PlanWell offers a number of ordering options; this guide will cover each of these options. The options available to you, however, will again be based on your permissions and preferences.

Print Order –

“Print Order” is PlanWell’s standard 4 step ordering process. This option will allow you to order documents for yourself as well as distribute to others in your address book.

Note: Throughout the order process you will find “breadcrumbs” showing where you currently are and providing you with both a step forward and a step backward.

After populating your shopping cart, you will begin the standard order process by clicking [Print Order]

Step 1: Print Options –

As you begin the order process, you will find along the left column standard information necessary for billing. Based on your login information, “Ordered By”, “Job Name” and “Charge To” will be pre-populated. If desired, you may add a job number, P.O. number and special instructions for the order. Further, you will have the option to select if this is a reimbursable

order. By selecting this, your invoice from the reprographer and your order history will show that the order is reimbursable; easing the billing process on your side.

Next you will specify the printing details for all documents and sets you are ordering.

Process Media/Size/Binding – Your default process media, size and binding will be automatically listed. If you would like a selection different from your defaults, you may change any default selection by selecting the correct option in the dropdown menus.

When making changes, it is important to note that by default, your selected changes will apply to all items being ordered. To change just one line item, click on the number next to the item and make the desired selections.

Bind All Checked – This option will bind together any selected items. This is a useful option when ordering multiple individual sheets.

Copy – Occasionally you may wish to order the same item more than once using different printing options (e.g.: one a full size, the other at half size). This may be done by selecting [Copy] in the appropriate item line. You may now change your printing options for the copied items as is done for all other items.

Print options for custom packages may be configured the same as for all other items unless listed under “Custom Packages (Fixed Price)”. A fixed price custom package has had all print options preconfigured and therefore this information cannot be changed. Custom packages will be discussed in greater detail later in this document.

Items may be removed from the order by clicking on the garbage can icon.

When all print options are set, please select [Next] to move to step two of the order process.

Step 2: Delivery Options –

PlanWell allows you to set the quantities and distribution of your order through a simple matrix that operates very much like a spreadsheet.

Order Recipients:

Recipients will be listed down the left column, shopping cart items along the center and delivery options along the right. Transmittal information may be determined from options listed at the bottom of the window.

When the order is first started, PlanWell assumes the order will be going to you. You may add as many additional recipients to this order as desired. By clicking on [Add Recipients] you will be

presented with four different address book organizational options. You may select recipients using any and all of these options or by using the search options along the left column.

Search for Users **Order > Delivery Options > Select Recipients**

Please select existing user(s) to add recipient(s) to current order.

Master Address Book Users Master Address Book Groups Project Address Book Planholders List

add selected user(s) as current order recipients

Select	Company Name	Name	Primary Phone	Trade
<input type="checkbox"/>	Concrete Barriers	Steve Johnson	555-5555	(3) 01005-Construction Organizations (3) 01008-Government (3) 01055-Construction Support Services (4) 03000-Concrete (2) 04000-Masonry (2) 04050-Masonry Procedures
<input type="checkbox"/>	construction	nathan smith	555-5554	(1) 01030-Special Project Procedures (1) 01060-Regulatory Require (1) 01008-Government (4) 01015-Design Support Services (1) 01019-Manufacturers' Support Services (1) 01006-Professional Organizations (1) 01009-Regulatory Team (1) 01010-Summary Of Work
<input checked="" type="checkbox"/>	Solomon Frisk	Jerry Jacobs	7636945913	-

Trade

- ALL
- 000000-Procurement and Contr
- 000110-TOC
- 002300-Procurement Definitions
- 007800-Section
- 01000-General Requirements
- 01005-Construction Organization
- 01006-Professional Organization
- 01008-Government
- 01009-Regulatory Team
- 01010-Summary Of Work

Search in

- All Users
- Employee only
- Contact only

Status: Active

Date Created Between

From:

To:

Master Address Book Users – This list will contain all employees and contacts in your address book. In addition to their name and company name, you will also be able to view any trade information assigned to them. Creation of the master address book is discussed later in this document.

Master Address Book Groups – Groups are logical organizations of users from the master address book. For example, you may choose to create a group of all users in a specific trade or within a specific company. Creation of groups is discussed later in this document.

Project Address Book – The Project Address Book contains all users from your master address book who you have determined have an interest in this project. While the master address book and groups are available for all projects, the project address book is project specific. Creation of the project address book is discussed later in this document.

Planholders List – The Planholders list is a listing of any user who has received

documents for this project. If you provide someone with the project number and password and they order documents, they will be added to the Planholders list even though they may not be in your master or project address books. While all other address book options discussed are created by you or your reprographer for you, the Planholders list is dynamically maintained as orders are placed in PlanWell.

After locating your desired recipient(s), place a checkbox next to the name or the group name and choose [Add Selected User(s) as Current Order Recipients]. All recipients will now be listed in the main Delivery Options window. After making this selection, you will be brought back to step 2, with all recipients added to the order. You may remove recipients by selecting the box next to their name, then clicking [Remove Recipients].

In some cases, you may need to change the delivery address for one of the recipients. By clicking on the box next to their name and choosing [Customize Shipping Address] you will be given the opportunity to change the address. It is important to note that this change is for this order only; permanent address changes must be made in the address book. This is discussed later in this document.

Special delivery notes can be assigned to one or more recipients by clicking the box next to the recipient(s) name, choosing [Special Delivery Notes], typing in the desired note and choosing [Save]. This information will print on the delivery transmittal for that specific recipient. This feature is most often used to alert the delivery driver of important information such as the location of a difficult to find job trailer or to ensure a proof of delivery signature.

Setting Quantities and Delivery Options:

Once all recipient information has been entered, you may select the desired quantities of each item for each recipient.

Each item in the shopping cart has been assigned a number. To view the details you may either hover over the item number or you may click on the item number. After clicking on the number, you will find the details regarding it listed to the left; above the recipient list.

Quantities for each item may be assigned either universally, individually or through a combination of both methods. To set a universal quantity, type in the number in the quantity box and use the 'apply over' arrow or 'apply down' arrow to assign to all users.

Items in Shopping Cart				
	 1	 2	 3	 4
	▼	▼	▼	▼
▶	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>
▶	<input type="text" value="1"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
▶	<input type="text" value="1"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>

Individual quantities may be assigned by typing in the quantity in the appropriate box. Although you may have utilized the universal quantity tools, you may override any of these settings by typing in the correct amount.

Similar to order quantities, delivery options may be set universally or individually. Delivery options include delivery method, due date and due time. It is important to note that all three delivery options has its own apply down arrow; therefore, applying information universally will require three separate “apply down” arrow clicks.

Transmittal Options:

The final step on the Delivery Options window is to specify transmittal options. You may select “No Transmittal”, “Standard Transmittal” or “Attach Custom Transmittal”. If you choose a standard transmittal, you will have the ability to add custom text to a generic transmittal. If you choose to attach a custom transmittal, PlanWell will present you with a dialog box where you may browse to your transmittal document and upload it into the order.

When all required information has been completed, you may proceed with your order by selecting [Next].

Step 3: Review –

The review window will allow you to see all details of the order. Where available, you may also see a price quote for all items ordered. If desired, you may remove items from your cart by selecting the delete from cart icon. As you remove items, the price quote listed will be adjusted to reflect the correct pricing for all remaining items.

Once you have carefully reviewed the order, you may finish the order process by selecting [Submit Order]

Step 4: Submit Order –

You will be informed of your successful order submission on this final order processing window. You will be provided with an order number and will have the opportunity to print the distribution, print the complete order or return to the project home.

Quick Package Order –

PlanWell offers a quick and easy ordering method matching custom packages to project address book users. Beyond these requisites, this option is most often used when you do NOT want to receive the order and all recipients have the same due date and time.

From the project home page, you will begin this ordering method by clicking on [Quick Package Order]. Since these orders are for custom packages only, it is not necessary to add items to your shopping cart from the main project page.

Planroom > Quick Package Order

Step 1: Print Options Step 2: Review Step 3: Submit

<p>Ordered By Jerry Jacobs</p> <p>Job Name Garden Gates(DEMO_7)</p> <p>Job No. </p> <p>P.O. No. </p> <p>Charge To Solomon Frisk</p> <p><input checked="" type="checkbox"/> Reimbursable</p> <p>Order Location MainLocation</p> <p>Printing Notes: </p> <p>Delivery Notes: </p>	<p>Select Recipient(s) Edit Proj. Add. Book to edit listing below Send Package(s) To: <input type="checkbox"/> SELECT ALL Users in Address Book <input type="checkbox"/> Unknown <input type="checkbox"/> Concrete Barriers, Jim, Smith <input checked="" type="checkbox"/> Concrete Barriers, Sue, Johnson <input type="checkbox"/> Concrete Barriers, Marvin, Jones <input type="checkbox"/> 03000 - Concrete <input checked="" type="checkbox"/> Cutting Edge, Dominic, Roads <input checked="" type="checkbox"/> Concrete Barriers, Steve, Johnson <input type="checkbox"/> 01005 - Construction Organizations <input checked="" type="checkbox"/> Concrete Barriers, Steve, Johnson <input type="checkbox"/> 01055 - Construction Support Services</p>	<p>Select Package(s): Add new package <input type="checkbox"/> Bid Package view <input type="checkbox"/> Architectural Package view <input type="checkbox"/> Mechanical Package view <input type="checkbox"/> Plumbing Package view <input checked="" type="checkbox"/> Concrete view <input type="checkbox"/> 0323 Architectural Package view <input type="checkbox"/> Bid Package 2 view</p>	<p>Printing & Delivery Options</p> <p>Quantity: 1</p> <p>Page Size: Full Size</p> <p>Media Type: Bond</p> <p>Binding: Staple</p> <p>Due Date: 3/25/2009 (mm/dd/yyyy)</p> <p>Due Time: 10:30 AM(Central)</p> <p>Delivery Via: Training and Demo De</p> <p>add to cart below</p>
--	--	---	--

Items in Cart * note!	Qty	Consultant	Size	Media Type	Bindery
1. Architectural Package	1	Concrete Barriers,Sue Johnson	Full Size	Bond	Staple
2. Mechanical Package	1	Concrete Barriers,Sue Johnson	Full Size	Bond	Staple

Step 1: Print Options –

As with the Place Order option, as you begin the order process, you will find along the left column standard information necessary for billing. Based on your login information, “Ordered By”, “Job Name” and “Charge To” will be pre-populated. If desired, you may add a job number, P.O. number, printing notes and delivery notes for the order. Further, you will have the option to select if this is a reimbursable order. By selecting this, your invoice from the reprographer and your order history will show that the order is reimbursable; easing the billing process on your side.

Building your shopping cart is as easy as matching user(s) to package(s). You may select all users in the project address book or narrow down the selection by choosing an individual user(s) or an individual trade(s). Selections are made by placing a check in the box next to the individual, the trade or the "Select All Users in the Address Book."

After selecting the recipients, click on the box next to the desired package(s). You may now select the Quantity, Page Size, Media Type, Binding, Due Date, Due Time and Delivery method. After all is selected, choose [Add to Cart Below]. You may continue matching users to packages until all items are listed in the shopping cart. Printing information may be different for each portion of the order however the due date, due time and delivery method must remain the same. Be sure to select [add to cart below] between each selection.

After the shopping cart is fully populated, click on [Next]

Step 2 Review –

Carefully review all details of your order. If necessary, you may remove any portion of the order by clicking on the garbage can icon. If the order looks as expected, click on [Submit Order].

Date Time Due: 3/25/2009 10:30 AM(Central)	Address: 3005 Ranch
Deliver To: Concrete Barriers	City: Plymouth
Deliver Attn: Sue Johnson	State: Minnesota
Delivery Via: Training and Demo Deliver	Zip: 55555
Delivery Notes:	Phone: 5555555
Special Instructions:	Fax:

Package	Qty	Drawings	Size	Media Type	Bindery	Remove
Architectural Package	1	Arch A-101, A-102, A-103, A-104, A-105, A-106, A-107, A-108	Full Size	Bond	Staple	
Mechanical Package	1	Mech M-111, M-112, M-113, M-114, M-115	Full Size	Bond	Staple	
Concrete	1	Struct S-105, S-106	Full Size	Bond	Staple	

Step 3: Submit Order –

You will be informed of your successful order submission on this final order processing window. You will be provided with an order number and will have the opportunity to print the page or return to the project home.

Instant Print Order

PlanWell allows documents to immediately be sent from PlanWell to any HP output device in your offices.

After populating your shopping cart, click on [Instant Print Order].

Step 1: Instant Print Order Options –

As with the Place Order option, as you begin the order process, you will find along the left column standard information necessary for billing. Based on your login information, “Ordered By”, “Job Name” and “Charge To” will be pre-populated. If desired, you may add a job number, P.O. number and special instructions for the order. Further, you will have the option to select if this is a reimbursable order. By selecting this, your invoice from the reprographer and your order history will show that the order is reimbursable; easing the billing process on your side. Once any necessary information is completed, choose [HP Instant Printing].

Step 2: Submit Order –

Instant print processing begins immediately upon choosing [Submit Order]. You will be prompted to enter which HP device to send the documents to. After selecting the appropriate printer, choose [OK].

Note: The first time you use the Instant Print ordering option, you will be prompted to install HP Instant Printing software on your system. After the download is completed, all HP devices installed on your system will be available for instant print.

After PlanWell sends all documents to your printer, you will receive a standard order confirmation screen. You may print the complete order to return to the project homepage.

Instant Download –

The Instant Download ordering option allows you to immediately download the high resolution, print ready files.

After populating your shopping cart, click on [Instant Download].

Step 1: Instant Download Ordering Options –

As with all other ordering methods, you will find along the left column standard information necessary for billing. Based on your login information, “Ordered By”, “Job Name” and “Charge To” will be pre-populated. If desired, you may add a job number, P.O. number and special

instructions for the order. Further, you will have the option to select if this is a reimbursable order. Once entered, choose [Download Now].

YOUR INSTANT DOWNLOAD ORDER HAS BEEN PLACED. (no. 3030240)
[Click here to download & save your Instant Order Files](#)

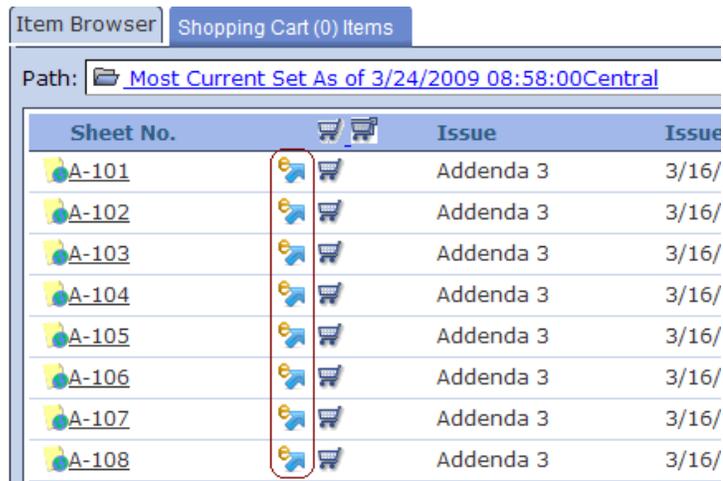
 You will shortly receive a receipt via email at solomon.frisk@gmail.com. Thank you for using PlanWell.

The instant download process will begin immediately. After PlanWell gathers the desired files and places them into a zip file, you will receive your order number and a prompt stating “Click here to download & save your Instant order files.” After clicking this link, you will follow standard download processes where you are asked to either open or save the download. As you have paid for these files, you will want to choose [Save] and specify a download location. The high resolution files will be saved to the specified location and available to your use.

You may now either print the complete order or return to the project homepage.

eTakeoff –

Tied in with the Instant Download ordering may be an option for eTakeoff. eTakeoff is a digital takeoff tool integrated into PlanWell. Documents available for download into eTakeoff are identified with the eTakeoff logo.



The screenshot shows a web interface with a navigation bar containing 'Item Browser' and 'Shopping Cart (0) Items'. Below the navigation bar is a path field: 'Path: [Most Current Set As of 3/24/2009 08:58:00Central](#)'. The main content is a table with the following columns: 'Sheet No.', 'Issue', and 'Issue'. The table lists sheets A-101 through A-108, each with an 'Issue' of 'Addenda 3' and a date of '3/16/'. Each row has an eTakeoff icon (a blue circle with a white 'e') and a shopping cart icon. A red circle highlights the eTakeoff icons for sheets A-101 through A-108.

Sheet No.	Issue	Issue
A-101	Addenda 3	3/16/
A-102	Addenda 3	3/16/
A-103	Addenda 3	3/16/
A-104	Addenda 3	3/16/
A-105	Addenda 3	3/16/
A-106	Addenda 3	3/16/
A-107	Addenda 3	3/16/
A-108	Addenda 3	3/16/

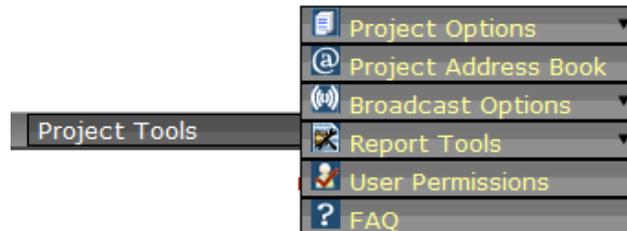
This tool will be discussed in the eTakeoff manual found at the end of this user guide.

Project Tools

From the project homepage, you have a number of additional project specific options available to you.

As mentioned previously, the options you see may vary from this document based on your permissions and preferences.

By clicking on [Project Tools] you may be given 6 menu options, some with multiple options within them.



- **Project Options –**

- Project Details - the project details options provide you with basic information on the project such as web post date, bid due date, walk through date, issue date, project phase and project description. This information must have been provided to the reprographer in order for it to appear in the project details window; any information not provided will appear as a “NA”

It is important to note that the Project Details window will include more information if this is a BidCaster project. BidCaster is an invitation to bid tool integrated within PlanWell. Project Details tied into BidCaster will be discussed in the BidCaster User Guide found at the end of this manual.

- Manage Packages – the packages available for ordering can be created and managed by your reprographer or, with proper permissions, by you. You may add, edit, assign trades and delete packages by choosing the Manage Packages option.

Add New Package

The Add New Package option allows you to create a new package which will be available for immediate use.

After selecting this option, you will begin by indicating the name for this package. It is recommended you select a name that will easily identify the contents of the package.

Next you will need to indicate if this package is to auto update. By selecting “yes” to this, you are indicating that if an updated/revised document from this package is added into PlanWell, it will automatically update the version in this package.

Indicate if this package will be viewable to everyone accessing this project or just by you for personal ordering and/or distribution.

It is now time to select the documents for this package. Your default view is a full current set; you may change this by using the Most Current Set and issue tree within the column on the left. As you identify the appropriate documents, place a check in the box next to them. Once all desired documents are selected, choose [Create Package]; this package will now be immediately available.

Assign Trades to Package

Assigning trades to packages is a function used for BidCaster, an invitation to bid tool integrated into PlanWell. The assign trades to package function will be discussed in the BidCaster User Guide found at the end of this manual.

Viewing an Existing Package

With any existing package, you may click on the package name to view the documents included in the package as well as see if the package is set to auto update or not.

Save As New

To maintain the integrity of your order history, the documents and settings for an existing package may not be changed. You may, however, choose "Save as New," edit the contents of a package and save it under a different name. This will maintain the integrity of the original package while creating a new package for ordering.

Once selecting "Save as New," you will be presented with the package details and options to change the name, auto update and viewable to all settings and the documents which exist in the original package. You may make any desired changes and choose [Save as New Package].

Delete

As a package becomes obsolete, you may choose to delete it to ensure no additional orders are placed. PlanWell maintains the history of this package so, although it appears to be deleted, PlanWell will continue to list it in the project history.

- Package Notification – the Package Notification option allows you to notify via email project address book users as packages become available. The email sent will

include a link directly into the ordering process, with the appropriate package already selected; making the ordering process seamless for the recipient.

Begin the process by defining a name for the notification. This should be an easy to identify name for future reference. Select which package(s) you would like to announce, who you would like to announce it to and choose [Next].

Type in a subject line for the email and the message you would like to include in the email. You may use the arrow down buttons to send the same information to everyone or type in different information for each recipient.

Under the “Charge To” column, indicate if you will be paying for any package orders placed as a result of this email or if the recipient will be paying for their own. If you will be paying, indicate the number of sets you will pay for under “Max Sets Allowed.” You may again apply these settings to everyone by using the apply down button or you may make each setting individually.

When the notification is set as you desire, choose [Send Notification].

After sending the notification, you will be immediately brought into the Notification History screen where you can review the email details, verify the email sent successfully and track if an order was placed from the link provided in the email.

Note: you are provided with details on if the email successfully left PlanWell’s email server. This feature will not notify you of an email bounce-back due to a bad email address. You will be notified of any undeliverable emails through an email to your standard email client.

The details found in this notification, as well as all other previously sent notifications, can be viewed by choosing the “Notification History” tab and choosing the notification name.

- **Project Address Book**

- The project address book option will bring you into the master address book where you will have the ability to create your project address book as well as complete all functions within the master address book.

After clicking on this option, you will be brought into the Project Address book tab in the master address book. You may add users to the project address book by searching for the user(s) using the standard or advanced search options. As you identify users to add to the project address book, place a check in the box

next to their name. Once all project address book users are identified, click on the “View Selected Contacts” tab and choose [Go] to “add selected users to the Project Address Book.”

- **Broadcast Options**

- Broadcast functions tie into BidCaster, an invitation to bid tool integrated into PlanWell. These functions will be discussed in the BidCaster user guide found at the end of this manual.

- **Report Tools**

- Project Reports – PlanWell maintains a list of all project documents; a valuable feature as documents are added, revised and eventually removed from the project. Throughout these changes, PlanWell maintains an accurate history of every document that has ever been in your project. You can retrieve this history automatically through the Project Reports feature.

After selecting Project Reports, you will specify a date, a discipline if appropriate and an addendum if appropriate. You may now select to receive a current set or historical set report. The current set report will list all documents matching your criteria that were current as of the date you specified, while a historical set will return every drawing that was issued prior to the date chosen.

The report provided will list all appropriate documents. You may print this report by clicking on the printer icon. You may also export this report by clicking on the export icon. After selecting to export it, you will specify the desired file format to export it in and choose [OK]. You will finish the process by browsing to the location you would like the file saved to.

- PlanHolders – Another unique benefit of PlanWell is its ability to provide you with reports on who received project documents, which documents were received and when. The Planholders report function gives you this information automatically.

After selecting PlanHolders List, you will be presented with up to four different planholder report options. As with other features in PlanWell, the number of options you are able to view will be based on your preferences.

All reports may be printed by clicking on the printer icon or exported by selecting the export icon, choosing the desired file format and specifying a location you would like the file exported to.

Note: In order to view reports, you must turn off any pop-up blockers or add

PlanWell to your allowable websites in your pop-up blocker settings.

Summary Report:

By selecting [View Report] you will be presented with a report listing all planholders, their company information and trades assigned to these individuals.

Standard Detailed:

By selecting [View Report] you will be presented with all information found in the summary report but will now also have a complete order history for each individual listed.

Sheet Based Search:

This report option allows you to verify if a specific sheet has or has not been received by your planholders. This report is particularly helpful when there is a dispute if a planholder has/had the most current version of a document during construction.

Begin by specifying a discipline or issue if appropriate to narrow down the sheet options you will be presented with. Select the sheet number and issue if appropriate. You may run this search for all planholders or select individual planholders by highlighting their name and using the arrow over button to move them into the “Selected Planholders” box.

After selecting [View Report] you will be provided with any order details matching your criteria.

- **User Permissions** – as mentioned throughout this user guide, many options you are able to view or not view are based on your assigned permissions and preferences. These are generally set for you by your reprographer. If you would like, you may also set these permissions within in the “User Permissions” option.

You will be able to assign these settings for yourself, your employees, those accessing the project through the guest project access point and those accessing the project through a

direct URL.

Begin by selecting the individual or group. Add checkboxes next to the permissions you would like this individual or group to have; remove checkboxes next to the permissions you would like to remove from this individual or group. Choose [Save Changes].

Note: Although these settings are immediately applied, any user logged into the project when you make these adjustments will not see the changes until the next time they log into the project.

Any individual or group that you do not make permission changes to will follow the default project settings your reprographer set for the project. Your reprographer will always work with you on these settings prior to adding a project into PlanWell.

- **FAQ** – PlanWell allows for you to use an FAQ forum to posting questions and answers to those questions. This can greatly reduce the number of emails and phone calls received. As questions are posted, an email will go to you or the appropriate employee; making it easy for the questions to be quickly posted.

Users will begin by specifying the appropriate trade the question is related to. By choosing “Post New Message” the user will be presented with an area to type in the subject and question. After choosing [Submit] the question will be listed within that trade and an email will be sent as mentioned above.

After receiving notification of the question, you or your employee can find the question in the FAQ section, write your answer and choose [Submit]. The answer will now be included. Any users logging into this project will be able to review all questions and answers.

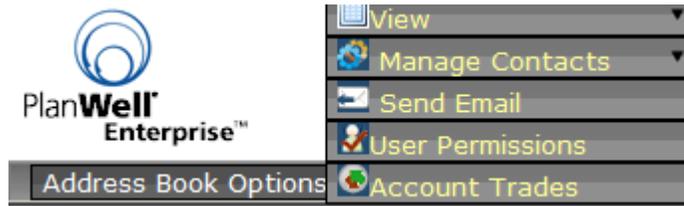
To keep track of the questions/answers being posted, you may choose [View FAQ Report]. This report can be printed by clicking on the printer icon or exported by clicking on the export button, choosing the desired file format and indicating the location to save the exported report to.

Additional PlanWell Features

Address Book – PlanWell holds your contacts in a sophisticated and detailed master address book. The more complete the details within the master address book, the more powerful it will become for you.

When you first click on the Address Book tab, you will see a snapshot of your master address book in the view you have specified as well as the “Address Book Options” menu where you will find a number of powerful tools. It is within this menu that you will build the foundation to

your address book.

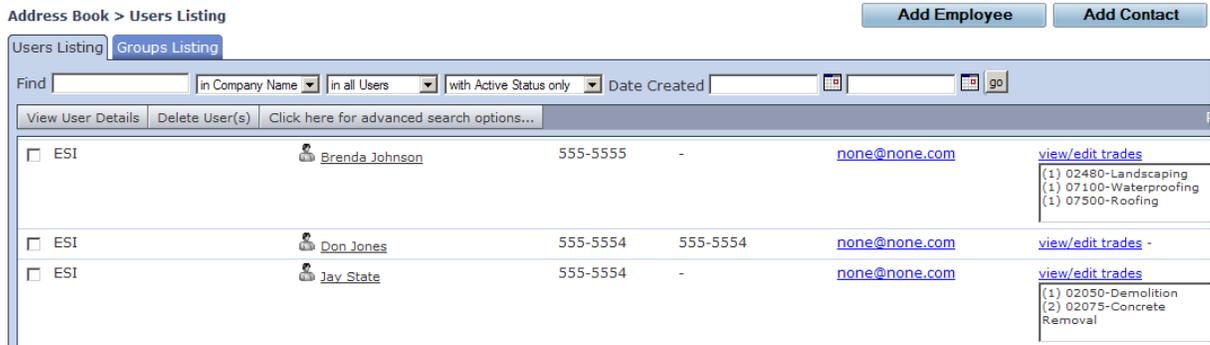


- **View**

The address book view can be changed based on your preference. Each view has slightly different functionality and options available.

Classic View:

When accessing the address book for the first time, the Classic View will be the default view. This view allows a quick look at all users in alphabetical order by company. You may click on any column headers “Company”, “Full Name,” and “Create Date” to change the sort.



By clicking on any user name, you will be brought into the full user details where you may make any necessary changes and save those changes.

Additionally, you may send email to an individual by clicking on the email address or change the assigned trades by clicking on “view/edit trades.”

Along the top of this view are the options to Add Employees, and Add Contact. These options are discussed in detail below in the next section of this manual.

By Clicking on the Groups Listing tab you will be brought into the groups window. Here you may view the details of any group by clicking on the group name. You may also make any changes to the groups through the Quick Edit or the Advanced Edit options.

New Groups can be created in one of two ways. The “Create New Group Quick” option allows you to select a user(s) from the address book list and use the arrows to move the user(s) to the right column. Name the group and choose [Save Changes]. The “Create New Group (advanced)” allows you to use search criteria to narrow down your list of users. Click on the box next to their name to select them. Once you have located and selected all desired users, click on the “View Selected Users” tab, type in a group name and choose [Save]

Company View:

The company view allows a quick look at all users in alphabetical order by company. You may click on any column headers “Company”, “First Name,” “Last Name,” “Email” “Fax,” and “Phone Number” to change the sort.

The screenshot shows a search interface at the top with a search bar and filters for 'Company name', 'User Type' (set to 'in all users'), and 'User Status' (set to 'with Active Status only'). Below the search bar are tabs for 'Master Address Book', 'Project Address Book', 'Planholders Address Book', 'Group Address Book', and 'View Selected Contacts'. The 'Master Address Book' tab is active. Below the tabs is a table with columns: 'All #', 'Company Name First | Last Name', 'CSI Trades', 'Email', 'Fax', 'Phone', and 'Minority'. Two users are listed:

All #	Company Name First Last Name	CSI Trades	Email	Fax	Phone	Minority
<input type="checkbox"/>	CDW Gary Johnson Minneapolis Minnesota USA 55441	Edit trades... <input checked="" type="checkbox"/> 01000-General R..(1)	bidcaster.demo@gmail.com	763-694-0376	5555555	
<input type="checkbox"/>	Concrete Barriers Steve Johnson Minneapolis Minnesota USA 55441	Edit trades... <input checked="" type="checkbox"/> 01005-Construct..(3) <input checked="" type="checkbox"/> 01008-Governmen...(3) <input checked="" type="checkbox"/> 01055-Construct..(3)	bidcaster.demo@gmail.com	763-694-0376	555-5555	

You may make changes to the user information by clicking on either the user name or the “Edit Trades” option.

The Default address book when entering the Company View is the Master Address book. You may click through each of the tabs to view the Project Address book, Planholders Address Book and Group Address Book.

Throughout all of the different address books, you may quickly locate someone by using the basic search options at the top of the window. This allows you to search based on every column header such as last name, city, zip or any of the custom fields you created. You may locate someone through more advance search options by clicking on “More Options.”

The screenshot shows the search filter bar at the bottom of the page, identical to the one at the top. It includes a search bar, filters for 'Company name', 'User Type' (set to 'in all users'), and 'User Status' (set to 'with Active Status only'), along with 'Search', 'Reset', and 'More Options' buttons.

This advanced search field will allow you to not only search by all columns but now also based on CSI trades, trade ratings, territories, union status and date user account was created.

The power of these search features is best felt when trying to create a project address book or group. By selecting users while going through the various tabs and various searches, you will find all selected users within the final “View Selected Contacts” tab. You may now create a new group with these users, add them to the Project Address book or send an email to all.

CSI View:

The CSI view functions as the Company view does with the only difference that the users are listed by CSI trades rather than company.

Master Address Book Project Address Book Planholders Address Book Group Address Book View Selected Contacts						
No Trade		Company Name	Contact Name (Trade Rating)	Email	Fax	P
DIVISION 0	<input type="checkbox"/>	CSI-002300-Procurement Definitions				
DIVISION 1	<input type="checkbox"/>	Talisman Homes	John Kogel(2)	bidcaster.demo@gmail.com		764-55
DIVISION 2	<input type="checkbox"/>	Division-01				
DIVISION 3	<input type="checkbox"/>	CSI-01000-General Requirements				
DIVISION 4	<input type="checkbox"/>	CDW	Gary Johnson(1)	bidcaster.demo@gmail.com	763-694-0376	55555
DIVISION 6	<input type="checkbox"/>	Digital Steel	Dennis Davis(1)	bidcaster.demo@gmail.com		952-33
DIVISION 7	<input type="checkbox"/>	SST	Sally Johnson(1)	none@none.com	763-694-0376	555-55

Customize View:

Through this option you may select with address book view you would like to have as your default view. You may further customize this by indicating which column headers you would like to see. For example, if you are not interested viewing the default carrier, you may turn that column header off. The information can still be found in the user details, but it will no longer be present on the address book view you’ve selected.

These customized settings can be different for every employee within your company; allowing those coming into the address book to efficiently and quickly find the information they need.

- **Manage Contacts**

The manage contacts option provides you with the tools necessary to import or export your entire address book as well as add contacts or employees manually instead. The

processes outlined below can be done by you online or your reprographer may offer this as a service.

- Add Contact – those individuals listed in your address book are defined as either a contact or an employee. Contacts can be thought of as anyone outside of your company while employees are anyone within your company.

To add a contact into the master address book, type in the required contact information including name, company name, address and phone number.

The remaining information requested is considered optional; however, as stated above, the details provided make the address book more powerful. This optional information includes:

- Minority Classifications – WME, WBE, DBE and Fed 8a
 - (Rating) Trade – by choosing Edit, you may assign the appropriate trades to the contact. You may also assign a rating for each of the trades assigned. This is completed by highlight the desired trade, assigning the trade code and clicking on the arrow over button. Note: prior to adding trades and trade ratings, you must save your new contact.
 - Territories – if this contact works within a specific territory, you may assign that territory to the contact by clicking on edit, select the state and county and choose [Add Territories]. Note: prior to adding territories, you must save your new contact.
 - Union – you may use the drop down to set if this is a union shop
 - Notes – you may type in any notes applicable. As with all other fields, the notes field is a searchable field; if you intend to use it in searches you will want to maintain consistency in the information you type in.
 - Custom Fields – PlanWell allows for additional fields to be created based on your needs. The process of adding these fields in is discussed below.
- Add Employee – when choosing to add an employee, you will be brought to a window very similar to the Add Contacts window. In addition to the required information for a contact, an employee must also have the following included:
 - login credentials – username and password for entering your company planroom
 - Administrative Privileges – these settings will determine how much the employee can do within PlanWell. The standard settings are to allow the employee to manage contact, manage groups and place EWO orders. For any permission you would like to assign, place a check box in the appropriate box. You may also assign Administrator permissions. This setting will allow the employee to manage contacts, manage

- groups, place EWO orders and delete/deactivate an employee, define an employee's order dollar limit and assign the administrative permission to others.
- Order Dollar Limits – the amount specified will be the maximum order amount this employee can place. Orders about that dollar limit will be denied.
- Import Contacts – If you have more than one contact to add, you may opt to use the Import Contacts option instead.

Begin by specifying if you are importing an excel document or a CSV file and browse to your file. Next you will need to specify if the file has a header present; this tells PlanWell if it should include the top line or not. PlanWell does an excellent job of mapping your information to the proper address book format. You may however choose to download a template file, manually make the mappings and import that file back into PlanWell. If you have opted to do this, you will want to indicate that you are using a template file. Finally, indicate if you want any duplicate entries to overwrite the existing entry or be ignored.

On step 2, PlanWell will have pulled your file in and intuitively matched your data. You may use the drop down arrows in the Map Fields selection to make any necessary corrections or adjustments. As you make changes, the preview details will adjust accordingly. Choose [Next]

Destination Fields(s)	Select appropriate Mapping Field from file
First Name*	FIRST NAME
Middle Name	-- Select a Field --
Last Name*	LAST NAME
Company Name*	COMPANY
Title	-- Select a Field --
Email*	EMAIL ADDRESS
Work Phone*	-- Select a Field --
Work Ph Ext	-- Select a Field --

Top 20 records preview of the data										
First Name	Last Name	Company	Address	City	State	Zip	Phone Number	Email Address	OpStatus	Rem
Gary	Johnson	CDW	45 8th Street	Hopkins	Minnesota	55555	555-555-5555	none@none.com		
Kelli	Anderson	CDW	3005 Ranch	Plymouth	Minnesota	55555	555-555-5555	none@none.com		

Details of the status of your import will be displayed.

Operation started : 3/24/2009 11:03:09 AM

Import Reports Summary

[Click to view & print a detailed import report.](#)

Total Records :	30
Successfully Saved :	18
Successfully Overwritten :	0
Successfully Saved with warning	0
Cancelled :	0
Duplicate :	12
Error occurred :	0

- Export Contacts – You may export your entire PlanWell address book or address book groups at any time by selecting “Export Contacts.” You will need to specify your desired file format, if you want the entire book or a group and the user status. When you choose [Export] you will be prompted for a location to store the file.
- Recent Import – The recent import option will allow you to review any address book imports completed. By clicking “View Details” you will be provided with a detailed breakdown of your import. You may print or export this information.

- **Send Email**

Emails can quickly be sent to anyone in your address book through PlanWell. After selecting this option, you will be able to view a list of all employees, all contacts or a combination of both. Highlight the name of the individual(s) you would like the email to go to and click on either [To >>], [CC >>] or [BCC >>] to move the individual into the email. Type a name for the email, the subject line and the message. Click [Send Email Blast] to complete the process.

You may view all previous emails by clicking on the “Email Blast History” tab. You can view all email details by clicking on the email name. You may also resend the email or delete it from the list.

- **User Permissions -**

When adding a new employee, you are given the option to set permissions for the employee. You can complete the same process through the User Permissions option. After making this selection, you will be presented with a list of all employees and the available permissions. Make the desired adjustments and choose [Save Changes].

- **Manage Account Trades -**

The diversity of PlanWell allows you to work the way you want. PlanWell will allow you

to work from 5 or 6 digit CSI codes and will also allow you the ability to assign custom trade codes as well. You can further customize the lists you work from by creating a list of just those trades you use.

When entering the Manage Account Trades window, you can begin finding trades to add to your custom list. You may search for these trades individually or by selecting the 5 or 6 digit lists. Once the trades are listed in the “CSI Listing for Selected List” column, you may highlight the desired trades and select [Add >>] to move that trade(s) to the “Account Trades” column.

Importing Trades

You may also populate your account trades list through completely a unique listing you may be working with. You can import this list in by going to the “Custom Trades” column and clicking “import trades.” Begin by specifying if you are importing an excel document or a CSV file and browse to your file. Next you will need to specify if the file has a header present; this tells PlanWell if it should include the top line or not. Choose [Next]

On step 2, PlanWell will have pulled your file in and intuitively matched your data. You may use the drop down arrows in the Map Fields selection to make any necessary corrections or adjustments. As you make changes, the preview details will adjust accordingly. Choose [Next].

Once the information is uploaded into PlanWell, the trades will automatically be added to the Account Trades column.

If you have one trade you would like to add in, you can type the details in rather than completing the import process. Type in a trade number and description and click the [Add >>] button.

Modifying a Trade

Any trade saved in your Account Trade list can be modified. When you highlight the trade and choose [Modify Trade], the trade will be listed in the Custom Trade column. Make the desired changes and choose [Save Changes].

My Account - Within the [My Account] feature, you will have the ability set your account default preferences, view your profile information, upload your account logo, manage your BidCaster templates and create the custom address book fields discussed in the Address Book section above.

- **Account Preferences**

You may set default online ordering information for every service your reprographer offers through the Account Preferences tab. These default settings can speed up the ordering process.

When clicking on the Account Preferences tab, you will see the available services listed. By clicking on the name of the service, you may use the drop down fields to select your preferred default.

In addition to the services offered, you may click on “Miscellaneous Company Defaults” to view additional default settings such as if orders are reimbursable, delivery method, number of items listed per page for BidCaster functions and your address book and EWO ordering defaults.

After making all desired changes, choose [Save Changes]. These changes will be immediately set for all employees of your company.

Note: you must choose [Save Changes] as you move from one service to the next.

The screenshot shows a web interface with a navigation bar at the top containing tabs: "Account Preferences", "My Profile", "Upload Account Logo", "Manage Templates & Attachment Files", and "Manage Custom Fields". Below the navigation bar, there are three sections: "Plan Well - Large Black & White only", "PlanWell - Quick Package Order only", and "Miscellaneous Company Defaults". The "Miscellaneous Company Defaults" section contains the following settings:

Reimbursable	Yes
Default Delivery Method	Training and Demo Deliver
EWO Order Location	Remote Location 2
Default Page-size for BSR Page	100
Default Page-size for Advanced Address Book	100
Default Page-size for Bidcaster Pick List	100
Customize Broadcast Status Report	Click here to update Account level BSR view settings
Customize Address Book	Click here to update Account level Address Book
Customize Bidcaster Pick List	Click here to update Account level Bidcaster Pick List view settings
Select any available Repro Service	EWO - Large B&W

- **My Profile**

The [My Profile] tab allows you to view standard user information PlanWell utilizes for your account.

When entering the My Profile tab, you will be presented with your contact information. You may make any necessary changes and click [Change Profile].

To change your password, click [Change Password], enter the required information and choose [Change Password]

- **Upload Account Logo**

If you would like to further personalize PlanWell, you may add your company logo for all of your projects. This will change the logo in the left corner of from the PlanWell logo to your company logo instead.

After clicking on the “Upload Account Logo” tab, you may browse to the location of your logo, choose open and then choose [Upload Account Logo] tab.

Simply browse to the location of your logo file and choose [Upload Logo] from the upper right corner.

Once a logo has been uploaded, you may either edit or delete that logo by selecting the appropriate option.

- **Manage Templates**

The details within this tab are used for BidCaster, an invitation to bid tool integrated into PlanWell. Details on this are found in the BidCaster user guide at the end of this manual.

- **Manage Custom Fields**

PlanWell’s address book allows for you to enter a great deal of information regarding your employees and contacts. In some cases, however, you may want to include information not available in the address book. Examples may be unique minority classification, birthdays, special notes, etc. By utilizing the Manage Custom Fields option, you are able to add up to 5 additional categories for your employees and contacts. When activated, these fields become a searchable field like all other built in address book fields.

After entering the Manage Custom Fields tab, type in the name of your desired custom field and verify that the box next to the field is checked to activate the field. If you no longer need this custom field, you may deactivate it by removing the check box and clicking [Save].

Order History - The order history tab will provide you with a snapshot of all previously placed orders, including the current printing status. By default you will see all orders except those with a printing status of “Closed.” You may use the filters along the top to further narrow down the list of orders presented; allowing you to more quickly find just the specific order(s) you would like to view.

For every order, you may choose to view additional order details, reorder or re-upload the files.

- **View Order Details**

By placing a check box next to the appropriate order and choosing [View Order Details] you will be able to see all details of this order including billing information, requested delivery due date and time, items ordered, special instructions indicated and distribution details. Further, you will have the ability to print this information for your records.

- **Reorder**

By placing a check box next to the appropriate order and selecting [Reorder] you will be brought back into the order process with all documents and printing options pre-selected. This option will allow you to print an additional order exactly as the first was printed. If desired, you may also make adjustments to the original order.

- **Re-Upload Files**

This option is only available for EWO orders and will not be discussed in this document.

Repro Services and Supplies Tabs – These tabs will only be available if your PlanWell provider offers PlanWell EWO (Electronic Work Order). Details regarding this program are offered in detail later in this document.

Conclusion

Over the last decade we have seen remarkable change in the ways that the construction industry handles documents. PlanWell is committed to helping our customers manage this change by providing value driven, automated tools to streamline the communication of information to your teams.

Many of the best features of PlanWell Enterprise have been suggested by our customers. If you have an idea which you feel will allow PlanWell to improve your workflow, we would be happy to hear from you. Please drop us a line at enhancements@PlanWell.com.