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Overview

This guide will teach you how to properly use the tools and features found within the Change Takeoff Item Plugin. It is designed for use with PlanSwift® Takeoff and Estimating Software. This guide is not meant to be a step-by-step “walk through” document, although it can be used as a reference for getting the work done. If you encounter technical difficulty, consult this guide (including the FAQ section of this user manual) or contact the technical support department at:

PlanSwift® Technical Support
support@PlanSwift.com
1-888-752-6794 ext. 2

PlanSwift also offers additional training. For training options, contact the training department at:

PlanSwift® Training Department
training@PlanSwift.com
1-888-752-6794 ext. 4
Purchasing and Installation

Purchasing Plugins

If you need to purchase PlanSwift or a plugin product, contact the Sales Department at:

PlanSwift® Sales
sales@PlanSwift.com
1-888-752-6794 Ext. 1

Installation and Uninstallation

Installing and uninstalling plugins and starter packs is simple. For installing them, click on the Import Plugin Package icon (arrow 1 in Figure 1) from the PlanSwift Main Ribbon-bar Plugin tab (arrow 3 of Figure 1) and follow the prompts from there. For uninstalling, click on the Uninstall Plugin (arrow 2 in Figure 1) and follow those prompts.

Figure 1

Features

The Change Takeoff Item Plugin adds a Change Item Type icon to the Takeoff group on the Home ribbon-bar tab (Figure 2). This plugin is useful for when you’ve completed a takeoff but then realize you need to change a takeoff to another item you have already taken off. This tool allows you to change your takeoff item into another one, even if you have already finished. For example, you can change a Carpet area to Tile, Hardwood, Concrete or any other area. Note that you cannot change a segment to a
linear or the other way around. Segments will change to other segments, linear items to linear items, count items to count items, and area items to area items). The instructions below will guide new users through the basics of using the Change Takeoff Item Plugin to modify takeoffs. We highly recommend purchasing a training package for accelerated learning and faster customization.

![Figure 2](image1)

How To

How to: Change a Takeoff to Another Takeoff

Figure 3 shows some takeoffs that have been done to sample plan A1.2 Floor Plan – Sample Plans. The rooms with the brown area are carpet takeoffs labeled as “Carpet Brown” (see arrow 1 of Figure 3), and the blue area, a game room, is a tile takeoff labeled as “Game Room Tile” (see arrow 2 of Figure 3). Suppose now that the client wants the Computer Lab’s brown carpet changed to the same tile as the Game Room.

![Figure 3](image2)
To effect this change, click in the Computer Lab area to select the area takeoff for the Computer Lab. Notice that the Carpet Brown takeoff is currently 1702.5 SQ FT and the Game Room Tile takeoff is 369.0 SQ FT. Figure 4 shows the red highlight with the Computer Lab area takeoff selected (arrow 1). Click on the Change Item Type icon (arrow 2).

Figure 4
This opens the **Change Takeoff Item** window, which is scrollable (Figure 5). You should see both the Carpet Brown takeoff (arrow 1) and the Game Room Tile takeoff (arrow 2); select the Game Room Tile takeoff, and then click on **Change Item**.

This will cause the brown carpeted areas to be highlighted (Figure 6).
Click anywhere away from the selected takeoff areas, and you will see the computer lab area changed to resemble the Game Room tiled area (Figure 7).

Figure 7

Notice in Figure 8 that the **Carpet Brown** takeoff has been reduced from 1702.5 SQ FT to 1456.4 SQ FT (arrow 1) and that the **Game Room Tile** takeoff has been increased from 369.0 SQ FT to 615.2 SQ FT (arrow 2).

Figure 8
Note that attempting to select two or more takeoffs by holding the **Shift** key and clicking on them will result in only the last takeoff clicked on being modified, so if you want more than one of the takeoffs modified (but not all of them), you’ll need to do them one at a time. If you want all of them changed, then click on any one of the takeoffs you want changed (arrow 1 of Figure 9), select the takeoff you want it changed to (arrow 2 of Figure 9), click on **Change All Sections** (arrow 3 of Figure 9), and then click on **Change Item** (arrow 4 of Figure 9). This will change all **Carpet Brown** sections to the **Game Room Tile** takeoff.

![Figure 9](image-url)
Figure 10 shows the changes made when **Change All Sections** is selected. With all Carpet Brown takeoff sections changed to **Game Room Tile**, the **Carpet Brown** takeoff square foot value is now zeroed (arrow 1 of Figure 10), and **Game Room Tile** now has 2071.5 SQ FT.
If you no longer need the **Carpet Brown** takeoff, then you can click on it in the **Pages, Bookmarks** window and delete it, or you can have it deleted automatically by selecting **Delete Original** before applying the **Change Takeoff Item** command (see Figure 11).

![Change Takeoff Item window](image)

**Figure 11**

**FAQ**

**Question:** I’ve read this user guide, and I still have questions. What do I do?

**Answer:** PlanSwift recommends that you purchase a training package. We highly recommend new users purchase a training package, because training is customized to each user. We offer [one-on-one training](#) and [classroom training](#). Contact [training@PlanSwift.com](mailto:training@PlanSwift.com) or at 1-888-752-6794 Ext. 4.

**Question:** I made a change but want to change it back. What do I do?

**Answer:** Click on PlanSwift’s Undo command.