



# PLANMAN MINI GUIDE

## For clients

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Graham Simpkin Planning (GSP) uses PlanMan to manage Enquiries and Projects.

Clients are able to [LOG IN](#) and access the following at any time and from anywhere:

- Review and update their contact details;
- Submit new enquiries;
- Review and accept quotes;
- Keep track of project progression;
- View, download and upload project documents and plans;
- View invoices and export project statements;
- Communicate with staff;
- Set notifications.

This mini-guide seeks to help clients make the most of the app.

## 1 ACCOUNT SETTINGS

*> Click your name/company name to top left > click blue icon that appears*

1.1 From here you can change what email notifications you receive as well as change your/your company's contact details and your Graham Simpkin Planning PlanMan account password. The following notifications are available:

- Enquiry Status Change
- Quote Issued
- Project Status Change
- Document Added To Project
- Communication Received

## 2 CLIENT DASHBOARD

*> Click Dashboard on left menu. This is the default screen when you login.*

- 2.1 My Unpaid Invoices: lists all unpaid invoices. Click the Invoice (IN) number for details of each Invoice. Click the Project Title for more details of the Project that the invoice is associated with.
- 2.2 My Outstanding Quotes: lists Quotes that have been issued to you/your company that require attention. Click the Quote (QU) number for details of each Quote.
- 2.3 My Projects: lists all GSP Projects that you/your company have instructed us on, including those Not Started, Ongoing or Completed. Click the Project (PR) number for details of each Project.

### **3 ENQUIRIES**

*> Click Enquiries on left menu. This will list Enquiries that you/your company have created using PlanMan or that have been created by Graham Simpkin Planning staff on your behalf. You can search the list using the dedicated Search bar within this page*

- 3.1 To view details of an existing Enquiry click the Enquiry (EN) number.
- 3.2 Clients should add a new Enquiry if they wish to seek a Quote for work on a new Project (including an appeal against a refusal, new representations or the submission of details pursuant to a condition of a planning permission). This should not be used to seek Quotes for additional work in connection with an Ongoing Project, which should instead be sought using the Communications facility within PlanMan – details are set out below.
- 3.3 To add a new Enquiry, click the '+' button and complete the form. Upon the form being submitted GSP staff will firstly allocate the Enquiry to project staff, who will then contact you to discuss your requirements in more detail. If the conclusion is that the Enquiry should proceed to a Quote, the status of the Enquiry will be updated to reflect this and a Quote will be issued normally within 5 working days.

### **4 QUOTES**

*> Click Quotes on left menu. From here you can click and view a list of issued and accepted Quotes.*

- 4.1 Quotes are issued by email.
- 4.2 To view/review an issued Quote, click the Quote (QU) number.
- 4.3 To download a PDF copy of an issued Quote that should have also been received via email, click the PDF button. This will also contain a copy of GSP's terms and conditions.
- 4.4 To accept an issued Quote, click the 'Accept Now?' button. Please note: by accepting a Quote you agree to GSP's terms and conditions that are attached to the PDF version of the Quote that will also be issued by email.
- 4.5 If you wish to discuss the Quote in more detail, please contact the relevant GSP project owner (click Quotes on the left menu to check this). GSP project owners can re-issue the Quote if necessary.

## 5 PROJECTS

> Click *Projects* on left menu. From here you can view a list of all *Projects* that you/your company have instructed GSP on.

- 5.1 To view details of any listed project, click the Project (PR) number.

### Project tab

- 5.2 This sets out a summary of the Project details and will include the Council's planning application reference or Planning Inspectorate's appeal reference if applicable and once either is made valid, as well as a link to the application/appeal on their portal.

### Stages tab

- 5.3 This provides a summary of each stage of the Project. Hovering over the Title of the stage will display the full details of the work involved at that stage, which will reflect the Quote that was accepted. The list will also state the GSP project owner that is dealing with a specific stage in the Project, as well as replicating the price of the stage from the accepted Quote. Start and Completed dates will also appear. Hovering over any Dates that are listed will provide more details.

### Files tab

- 5.4 This provides a list of all Files associated with a Project, including (where applicable) drawings, Land Registry documents, planning statements, co-consultant reports, appeal documentation and decisions. This will remain accessible for as long as you have a valid GSP PlanMan login.
- 5.5 To download individual files, click the Filetype icon to the right of the screen.
- 5.6 To download multiple files tick the checkbox to the left of the files you wish to download and click the Download button to the right of the search/filter box.
- 5.7 To download all files tick the checkbox to the top left of the Title column and click the Download button to the right of the search/filter box.
- 5.8 Clients can also upload relevant documents to Projects. To do this:
1. If the source of the document is attached to an email, save the attachment to somewhere memorable;
  2. In PlanMan search and click the relevant Project reference;
  3. Click the Files tab;
  4. Click the '+' button;
  5. Click the Choose Files button;
  6. Locate and select file (or multiple files if needed by holding down the CTRL key);
  7. Click 'Add Document'. The Client and Staff should receive a notification that a Document has been added to a Project if that notification is set;
  8. GSP staff will set the Document Type to the File(s).

### Invoices tab

- 5.9 This will list all Invoices in connection with the Project, including their status.

- 5.10 Clients are able to produce PDF Project statements by clicking the Download button to the right of the search/filter box. It is not possible to produce client-wide statements – only those relevant to individual projects.

Communications tab

- 5.11 GSP Project Owners will use this function to communicate with the client in place of emails where possible. This will save and collate all communication with the client on any particular project. The Client and Staff can easily refer back to communications between the two within PlanMan.

**6 INVOICES**

*> Click Finances on left menu. From here you can click and view a list of Invoices and their status across all of your/your company's GSP Projects.*

- 6.1 The list can be filtered by Project Title and Project Address using the dedicated search box.

**7 COMMUNICATIONS**

*> Click Communications on left menu. From here you can click and view a list of all Communications across all of your/your company's GSP Projects.*

- 7.1 The list can be filtered by Project Title, Address and Subject using the dedicated search box.