

CLIENTS AND GUESTS: QUICK REFERENCE

For people who were sent a Plotlay project, and for owners working with them. 4 lessons, 13 min. Full steps and pictures:
getplotlay.com/learn/clients/

#	LESSON	HOW
1	OPEN A PROJECT SHARED WITH YOU 3 min	Open the link: no account needed to look and walk through. Make a free account to comment or pick options; it lands in Shared with me .
2	COMMENT AND PICK DESIGN OPTIONS 3 min	Show each design option > Pick this . Add a comment > Pin to a place > click the spot > Comment . Replies and resolve in the thread.
3	TRY CHANGES IN A CONNECTED COPY 4 min	Take a copy (or Take a connected copy) > Make my copy > change it > Connected copy > Send your changes back . Pull in later changes there.
4	REVIEW CHANGES SENT BACK TO YOU 3 min	Proposals > compare Now and Proposed > Accept or Reject each > Apply decisions (one undoable step).

Words: **Design option:** One of two or more versions of part of a design, such as two vanities, kept in one project. Only the chosen option shows; clients can pick the one they like. **View link:** A link anyone can open to look round a project without an account. It can end after 7 or 30 days, or never, and you can turn it off at any time. **Starting view:** Where a guest or link starts (the whole project, some rooms, the 3D model, an option set or a document), what they can see and change, and a note for them. **Pin (control point):** A pair of matching points, one on a drawing and one on the map, that places the drawing. Two pins place it; a third shows how well it fits. **Guest roles:** What a person you invite may do: Can view (look and walk through), Can comment and pick options, or Can edit. Viewers need no account. **Connected copy:** A guest's own copy of a shared project that stays linked to the original. Changes made in it go back as a proposal, and later changes to the original can be pulled in.

Plotlay · app.plotlay.io · Search any tool with Ctrl+K (Cmd+K on a Mac). Checked in the app on 14 October 2026.