

TEAMS AND ADMINS: QUICK REFERENCE

For the person who sets Plotlay up for a team, and anyone sharing work. 7 lessons, 23 min. Full steps and pictures:
getplotlay.com/learn/teams/

#	LESSON	HOW
1	SET UP A TEAM 4 min	Account > See the Team plan > People > Start a team . Invite by email with a role. Put projects in the team with Share > Team space .
2	INVITE GUESTS TO A PROJECT 3 min	Share > Invite people : email, Can view , Can comment and pick options or Can edit > Invite . Who has access to change or Remove .
3	PLANS AND LIMITS 3 min	Account > Upgrade : Project pass A\$29 once, Pro A\$29 a month, Team A\$99 a month for 5. The sharer pays; guests need only a free account.
4	CHANGE PLAN, GET INVOICES OR CANCEL 3 min	Account > Change plan , or Billing & invoices for invoices, card and cancelling. After a downgrade nothing is removed; new invites wait.
5	SHARE A PROJECT WITH A LINK 3 min	Share > Starting view and a note > Links : role, how long, who for > Make link (copied). Preview what they see first.
6	SET WHERE GUESTS START AND WHAT THEY SEE 4 min	Share > They start at > note > Limit what they see or change > Preview what they see . Change start for someone already invited.
7	KEEP SHARING UNDER CONTROL 3 min	Links with an end date. Limit what they see or change . Turn off a link, then Remove people who joined with it. Check Activity and comments .

Words: **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. **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. **Phase (existing, proposed, demolish):** Whether something is there now and stays (existing), is new work (proposed) or is coming out (existing, to be removed). Plans, 3D and documents show Current, Proposed or Both from it. **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. **Client view:** The simple view a guest gets: the plan, a 3D walk-through, design options, allowed documents and comments, with none of the editing tools. **Layer:** A group of things in a project, listed in the Layers tab. A hidden layer is left out of the plan, 3D and documents until you show it again.

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