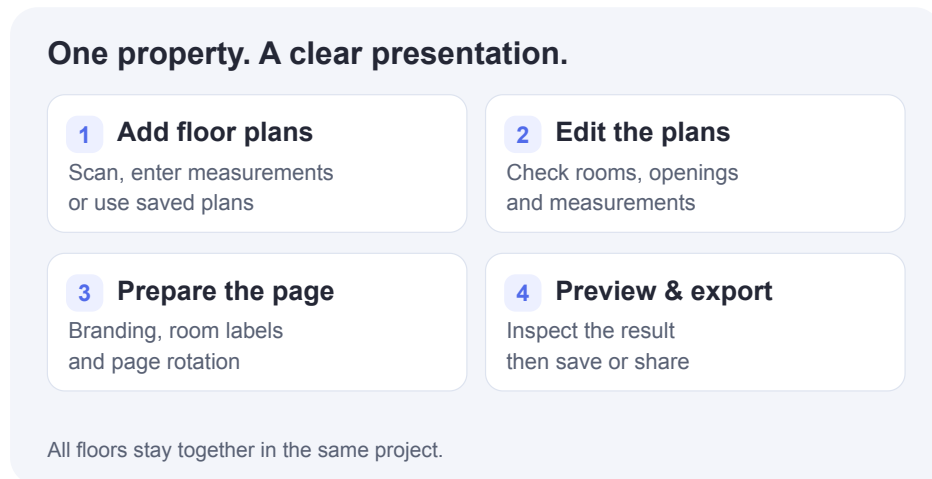


Create an Estate Agent property plan

Turn the floor plans in a project into a property presentation with your company details, room labels and a layout you can share as a PDF or image.

This guide takes you from **Projects** to an exported property plan. You can start with a new property or use a project you have already scanned. There is no need to scan it again just to use Estate Agent tools.

[Choose your starting point](#) · [Set up and edit](#) · [Prepare the presentation](#) · [Export and return later](#)



Workflow illustration, not an app screenshot.

Choose your starting point

- **Already have a project:** open it and choose **Create a property plan** under **Professional tools**. Confirm **Use this project**. If already enabled, open **Property plan** under **Plans & reports**.
- **Starting from scratch:** choose **Estate Agent** on the Projects screen, then **Create a property plan** or **New project**, depending on whether you already have agent projects.
- **Want to try it first:** open **Getting started** and **Explore an example**. The example is temporary and does not save a property to your account.

The property plan uses your project's saved floor plans. Company branding is optional. LiDAR is only needed when you choose live scanning; you can also use existing plans or enter measurements.

1. Set up the property

For a new property, enter a clear project name, add the address if useful, and tap **Continue**. The project opens so you can add its plans. For an existing project, keep using the same saved property.

From the project's **Plans & reports** section, open **Property plan** to reach the Estate Agent workspace. This is where you edit the floor plans, set up company details and open the export preview.

Use one project for one property. A project can contain multiple floors and can also use EPC tools.

2. Add the floor plans

1. Tap **Add plan** in the project or Estate Agent workspace. If the workspace is empty, use **Add floor plans**.
2. Choose the correct **Floor**.
3. Choose **Scan with LiDAR**, **Enter measurements** or **Add existing scans**, as available on your device.
4. Save the plan and repeat for the other floors.

For a whole house, save each storey as a separate floor plan inside this project. See the [multi-storey scanning tutorial](#) for the capture sequence.

Existing scans must be eligible to move into the project. Adding separate rooms to the same floor does not automatically join them into one drawing. Combine and align them in the project when you need a complete floor plan.

3. Check and edit each plan

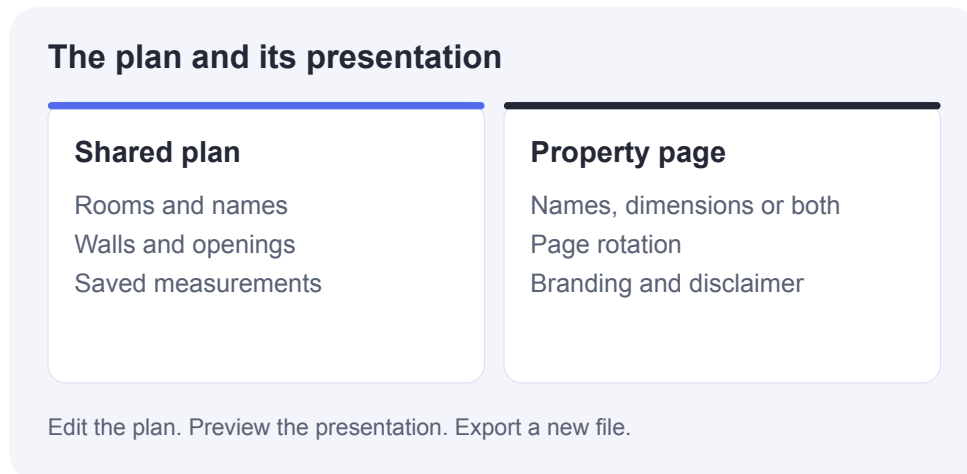
Open **Edit plan** on a floor-plan card. Check the room names, walls, openings and important dimensions. Use the editor's save controls to keep your changes, or discard changes you do not want.

Plan edits update the saved project in every workspace. Property-page room labels and page rotation are presentation settings; they do not replace the underlying plan measurements.

4. Add details and branding

1. Open **Company profile** to add your company name, contact details and logo. Tap **Save**. This profile is reused on other property reports, so check shared company details before changing them.
2. Open **Project details** to check the name and address for this property, then save your changes.
3. Use **Project photos** if you want to capture or organise photos in the project. Keeping photos here does not automatically add them to the property-plan page.

You can leave Company profile empty and use the standard presentation. Complete the plans first if you are in a hurry.



Keep the drawing and its presentation distinct.

5. Preview the property plan

Tap **Preview & export** in the Estate Agent workspace. Allow the preview to finish, then check the following:

- **Plans to include:** select the plans you need. Selecting a combined plan replaces its source rooms in the selection to avoid duplication.
- **Room labels:** for each selected plan, choose **Names only**, **Dimensions only** or **Names and dimensions**.
- **Page rotation:** align floors visually if needed. The selected plans use the same scale; changing page rotation does not change survey bearings.
- **Disclaimer:** use the standard text or add a suitable custom disclaimer for this property's presentation.

Choose PDF, PNG or JPG. If you choose an image, check its image-size option. Open the preview to inspect small labels and the overall layout. Use **Edit plans** or a plan's **Edit plan** action if the drawing itself needs correcting, then save and review the updated preview.

6. Export the file

1. Wait until the current preview has finished updating.
2. Tap the export button for your chosen format. Complete any access or upgrade step shown in your app.
3. In the system share sheet, choose where to save or send the file. For a PDF, **Save to Files** lets you keep a copy to inspect before sharing.
4. Open the exported file and check every included floor, the property details, labels and disclaimer.

Opening a preview does not send a file. Exporting opens the sharing choices; saving or sending is the next step.

Leave and return later

Tap **Close** to leave the export screen, then use the back arrow to return to the project. You can return to **Projects** and reopen the property whenever you need it.

To continue, open that project's **Property plan** under **Plans & reports**. To create another property, return to the Estate Agent library and choose **New project**. Opening an existing property resumes it; it does not create a new one.

Common questions

Do I have to finish a checklist before using my plans

No. **Getting started** is optional help. You can edit and export when your plans are ready; there is no separate tutorial completion step that sends the property plan.

Can the same project also have an EPC survey

Yes. Open **Start EPC survey** from that project's professional tools and complete its setup. The project keeps its plans. Agent presentation settings and EPC report options serve different outputs.

Why is my latest change missing from a file I already sent

An exported file is a snapshot. Save the changes in Room Scanner, reopen **Preview & export**, and export a new file. Copies already saved or sent do not update automatically.

For survey evidence and reports, follow the [EPC tutorial](#). If a step differs in your app, [contact us](#) with your device, app version and the screen you reached.