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PLANCRAFT USER GUIDE

Getting Started

Set up your account, create your first plan, and know where to go next.

Your first PlanCraft journey

1. Choose whether you are building a business plan or a personal/project plan.
2. Complete the guided 11-step questionnaire. Use the AI assistance when you want help clarifying a response.
3. Review your answers, then select Save & Complete.
4. Create an account or log in if PlanCraft asks you to. Return to the builder and finish saving.
5. Review the automatically generated Executive Summary and open the completed plan in Plan Viewer.

A helpful note for first-time users

After sign-up If account creation returns you to the Plan Builder without completing the save, select Save & Complete one more time. Your pending work should still be available.

What happens after you save

Your plan is organized PlanCraft turns your questionnaire responses into a structured plan and generates the Executive Summary.	**A PDF is prepared** First-time users should receive a welcome email with a PDF copy of the completed plan.
You enter Plan Viewer From there you can read, edit, share, comment, print, export, and continue into related tools.	**My Plans becomes home base** Return later through My Plans, then select the plan you want to continue working on.

Before you begin

- Use an email address you can access; it is tied to login and plan delivery.
- Answer with real details, even if they are imperfect. You can revise the plan later.
- Save only when you are ready to create the structured plan; review your answers first.
- If the email does not arrive, check spam and confirm the email attached to your account.

Your next best step

Open the finished plan and read the Executive Summary first. Then choose one area to improve or continue into the Action Plan to convert strategy into scheduled work.