Print, download and send the package

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Context

The step 5 commands let you print, download the package or send a viewing link.

Starting point

Step 5 — delivery commands

Prerequisites

- Check the package, recipient and version to send.

Steps

1. Print or download the plan

At the top right of the preview, use the print command or click Download PDF. You obtain the plan with the selected layout and attachments.

2. Download the complete package

Click Download ZIP. The file contains the plan in PDF, a folder of technical data sheets and a folder of safety data sheets for products used in the plan.

3. Open link sending

Click Send viewing link. A window opens with available addresses: customer, representative and users linked to the customer, depending on the data entered.

4. Choose the recipient

Select a suggested address or enter a different address. Check the recipient before sending. The email contains a link for retrieving the complete package, without attachments.

5. Distinguish feedback from final delivery

A draft can be sent to obtain feedback. For final delivery, perform the checks and closing described on the next page, then send the closed version.

Expected result

The plan is printed or downloaded, the ZIP retrieved or a link sent.

Remember

- The ZIP contains documents for products used in the plan. Check that they are present and up to date before sending the package to the customer.

See also

- Approve and close the plan

- Check the package before delivery

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