



# REVALIZE UNIVERSITY COURSE CATALOG

**Product: PLAN-IT**  
*Year 2026*

## PROJECT and REPLACE Training

*Each quarter, the Revalize Training Team hosts a series of live, instructor-led virtual courses that provide an overview of the key features and tools within the PLAN-IT application. This Project Training Series will prepare users to manage projects successfully and efficiently!\**

*\*Prices are as of January 1, 2026.*

*\*Please contact us on [our portal](#) to inquire about combined training packages and quotations, including private group and on-site training.*

 [Revalize University](#)

 [Support Portal](#)

# PLAN-IT | PROJECT TRAINING

## VIRTUAL PRIVATE CLASS

8 hours | Instructor-Led | \$2,750

## ON-SITE PRIVATE CLASS

2 days | Instructor-Led | \$7,100

### PRIVATE MENTORING SESSIONS

10 hours of mentoring sessions available for a year  
(scheduled in a minimum of 30-minute increments)

Instructor-Led | \$2,495

Flexible schedule coordinated with the instructor.

More information on the topics covered are listed below.

Please contact us on [our portal](#) for quotation and scheduling.

### Introduction to PLAN-IT

- Basic Navigation and Icons
- Navigation Menus and Resource Center
- Catalog Searching
- Categories and Subcategories Searching
- Supplier Searching
- Creating a Project (New/Clone)

### Advanced Project Management II

- Creating and Managing Project and Org Scope Custom Fields
- Custom Products and Custom Suppliers
- Quick Exports
- Reporting Menu
- Configuring and Generating Report Exports
- Custom Reports

### Project Management Basics

- Adding and Managing Project Rooms
- Managing Buildings, Levels, and Departments
- Adding and Managing Project Items
- Options and Accessories
- Project and Item History

### Advanced Project Management I

- Creating and Managing Templates
- Creating Templates from Project Departments and/or Rooms
- Adding and Managing Products on Templates
- Managing and Assigning Project Budgets
- Custom Budgets
- Budget History

### Procurement, Approvals, and Workflows

- Define Procurement vs. Requisition
- Create and Manage Requisitions
- Procurement Fields
- Approval Groups
- Item Approvals
- Request and Requisition Workflows
- Procurement Reports

Register at Revalize University [learning.revalizesoftware.com](https://learning.revalizesoftware.com)  
for self-paced courses, certifications, and more!

# VIRTUAL Q&A SESSIONS

## PLAN-IT | PROJECT Q&A SESSIONS

30 mins | Instructor-Led  
Open to all subscribed users

DATE	TIME (US EASTERN)
THURS. JAN. 22, 2026	10:00 AM – 10:30 AM
THURS. FEB. 19, 2026	10:00 AM – 10:30 AM
THURS. MAR. 19, 2026	10:00 AM – 10:30 AM
THURS. APRIL 16, 2026	10:00 AM – 10:30 AM
THURS. MAY 14, 2026	10:00 AM – 10:30 AM
THURS. JUNE 11, 2026	10:00 AM – 10:30 AM
THURS. JULY 16, 2026	10:00 AM – 10:30 AM
THURS. AUG. 20, 2026	10:00 AM – 10:30 AM
THURS. SEPT. 17, 2026	10:00 AM – 10:30 AM
THURS. OCT. 15, 2026	10:00 AM – 10:30 AM
THURS. NOV. 12, 2026	10:00 AM – 10:30 AM
THURS. DEC. 10, 2026	10:00 AM – 10:30 AM

## PLAN-IT | PROJECT CERTIFICATION PROGRAM



To receive a certification, you will have to demonstrate a mastery of knowledge of all the features and tools within the PLAN-IT application. The Plan-It Certification Course Exam will confirm your understanding of the topics covered in the Project Training series, including but not limited to catalog searching, project building, room and item management, template management, budgeting, reporting, and procurement activities. *Although it is highly recommended that users attend training, it is not a requirement for certification.*

To receive certification, you must score an 80% or higher and have an active license at the time of completion.

If you have any questions or concerns, please feel free to reach out to the training team on [our portal](#).

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# PLAN-IT | REPLACE TRAINING

## VIRTUAL PRIVATE CLASS

4 hours | Instructor-Led | \$1,250

### Topics Included for Admins:

- REPLACE Setup
- Import Hierarchy
- Adding Campuses, Buildings, Departments and Cost Centers
- REPLACE Budget
- Custom Fields
- User Management
- Operational Settings
- Managing Requisition Field Requirements
- Adding Approval Groups
- Managing Workflows

### Topics Included for Users:

- Introduction to REPLACE
- Requested Items Management
- Request Approvals Management
- Requisition Management
- Reporting

## FOR SUPPLIERS

Self-paced onboarding video available.

[CLICK HERE](#)

## VIRTUAL PLAN-IT SUPPLIER PORTAL TRAINING

2-Hour | Instructor-Led | \$360 per session

- Learn to create and manage locations, contacts, and user roles for seamless organization and discoverability.
- Master catalog navigation, bulk resource uploads, and product detail management to keep your offerings accurate and up to date.
- Explore how to launch real-time promotions, manage contracts, and use templates to boost bundled sales and reach qualified buyers.
- Utilize platform metrics and reporting features to gain actionable insights and track your organization's performance.

Private session include attendance for up to 4 enrollees, fees applicable for additional attendees.

Flexible schedule coordinated with the instructor.

If you are interested in a live virtual instructor-led supplier training, please contact us on [our portal](#) for quotation and scheduling.