

# Easy PV Pro FAQs

Welcome to our Easy PV Pro frequently asked questions. If you have questions about standard Easy PV, have a look at our [standard FAQs](#).

If you are unsure what feature your question relates to, use the **search bar** in the top left. You can also contact us at [help@easy-pv.co.uk](mailto:help@easy-pv.co.uk) if your question is not answered here.

- [General](#)

- [What additional features do I get with Pro?](#)
- [What happens to all my cloud stored documents if I cancel my Pro Subscription?](#)
- [Is there an Easy PV app for the surveys task?](#)
- [Can I have a custom cover page?](#)
- [Can Easy PV Pro be used as a QMS?](#)
- [Does Easy PV have integrations with CRM systems?](#)

- [Payment](#)

- [What are the associated costs?](#)
- [Can I get a free trial of Pro?](#)
- [Can I get a refund if I don't like Pro?](#)
- [How do I cancel my Pro subscription?](#)

- [Setting up](#)

- [My bank is not showing up when trying to upgrade to Pro, what should I do?](#)

- [Sharing projects and components](#)

- [Can I share projects with other people in my team?](#)
- [Can I get my project to share with my team by default?](#)

- [Emails and e-signing](#)

- [Can I edit the required documents and have them be e-signed?](#)
- [Can I change the email templates or add new ones?](#)



- [Can I send emails from my email address rather than an Easy PV address?](#)



# General



# What additional features do I get with Pro?

Easy PV Pro has loads of extra features, these include:

1. **Group functionality** which will allow you to share projects and components and manage your team, and set standard company details for the whole team as well as an automatic price calculator.
2. **Organisational and Designing functionality** including:
  - Unlimited Magic designs,
  - Project sharing and status tracking,
  - Customer proposal customisations,
  - Emailing and doc management,
  - ENA direct connect API for easy, fast DNO applications all within Easy PV,
  - Survey and post-installation tasks,
  - Additional forms a consent waiver, letter of consent form and scaffolding request forms.
3. Access to our lead generation and instant estimate tool **Speedy PV**.

We are also adding new functionality all the time, including most recently Speedy PV, customer proposal customisations and Magic design mode.



# **What happens to all my cloud stored documents if I cancel my Pro Subscription?**

As per data retention regulations, we will hold your documents according to our data retention policy but they will become unavailable to you. If you wish to keep a record of any documents please do download them and store them as they are generated.



General

# **Is there an Easy PV app for the surveys task?**

The survey task can be completed from any device with a mobile connection, including mobile phones and tablets. Unfortunately, there is no app available for this at the moment.



General

# Can I have a custom cover page?

This is available for [Easy PV PRO](#) users. If you are an Easy PV Pro user you can read about how to include a custom cover page and make other customisations to the proposal [here](#).



General

## **Can Easy PV Pro be used as a QMS?**

No, at the moment Easy PV Pro cannot be used as a QMS. However, we are working towards this functionality with the document management options currently available.



# Does Easy PV have integrations with CRM systems?

Yes, here's the list of CRM companies that have integrations or are working on integrations.

- <https://www.helioscrm.co.uk> - live integrations with Easy PV and Heatpunk.
- [Jumptech | Electrification Made Simple](#) - in development
- [Software for renewable energy & property pioneers](#) - in development
- [Zervio: Comprehensive SaaS for Solar & Energy Management](#) - in development

Some of our customers also set up their own custom integrations with their CRM systems using our Open API if they have the technical skills to do so. In some cases customers have used [zapier.com](https://zapier.com) services to connect our APIs with their CRM system's APIs.

Easy PV Pro gives you access to generate an API key to use our Open API. Further information about this can be found in our [developer guidelines](#).



# Payment



Payment

## **What are the associated costs?**

Easy PV Pro costs £35 (plus VAT) per user, per month. If you are looking to have many users, it may be worth looking at our enterprise option which may come out at a lower cost.



Payment

## Can I get a free trial of Pro?

If you are interested in a free trial please get in touch at [help@easy-pv.co.uk](mailto:help@easy-pv.co.uk). Please do also [book one of our demo webinars](#) to see what Pro can do for you!



Payment

## **Can I get a refund if I don't like Pro?**

As per our terms and conditions, we cannot offer a refund if you cancel your subscription.



# How do I cancel my Pro subscription?

If you wish to cancel your subscription, you may do so at any point from the Pro Account Settings on the left if you are either an owner or admin of the group. Otherwise you will need to ask a member of your team who is an owner or admin.

## Subscription settings

### Easy PV Pro

You are currently subscribed to Easy PV Pro

Cancel Subscription



# Setting up



Setting up

# **My bank is not showing up when trying to upgrade to Pro, what should I do?**

Please get into contact with us at [help@easy-pv.co.uk](mailto:help@easy-pv.co.uk) and we'll get this sorted for you.

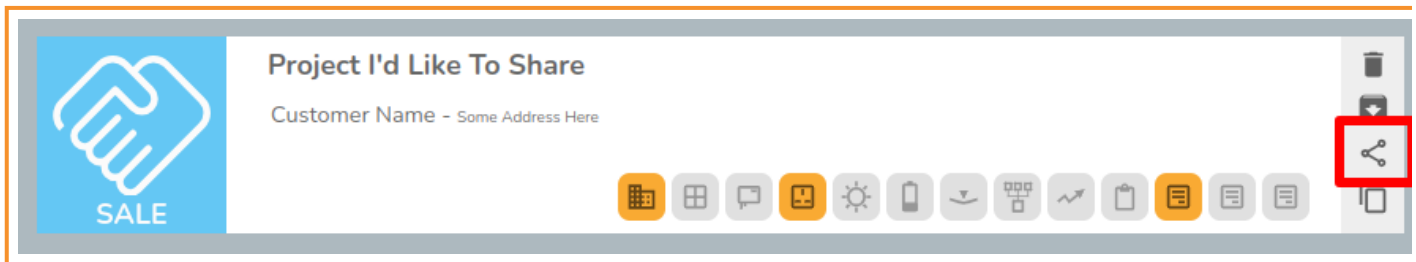


# Sharing projects and components



# Can I share projects with other people in my team?

Yes! In order to share a project you've created with your team, firstly navigate to the Projects list, and find the project you want to share. Then, find the little "share" button on the right-hand side.



You should be greeted with the a menu that gives you a list of your team members, and some options for permissions. You can select the permissions you'd like to give to your team using the buttons at the top - view, edit, delete. Alternatively, you can give another member of the team ownership of the project.



Then, once you're done, make sure you click "save" at the bottom of the menu screen.



Once you've done that, it should be shared with the rest of your team!







Sharing projects and components

# Can I get my project to share with my team by default?

Yes, you can set this up in **My Account** > **Preferences** by toggling on the sharing permissions you would like to be enabled by default.



# Emails and e-signing



## **Can I edit the required documents and have them be e-signed?**

No, you cannot change the required documents in the document manager or have custom documents e-signed but you can upload as many documents as you wish to individual projects.



# **Can I change the email templates or add new ones?**

The current email templates can only be edited on a case by case basis and new templates cannot be added.



# Can I send emails from my email address rather than an Easy PV address?

By default emails sent from Easy PV will send from a “no reply” email address, with your own email address is CC’ed. You can configure your email settings in **Pro account settings > Emails** so emails will come from your own domain.