Pro

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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.

Ready to get started?

You can upgrade your account to Pro directly within Easy PV - just login and look for the 'Upgrade to Pro' link and follow the instructions. If you want to learn more or see a demo of the features book yourself onto one of our FREE online webinars.

How much does a Pro subscription cost?

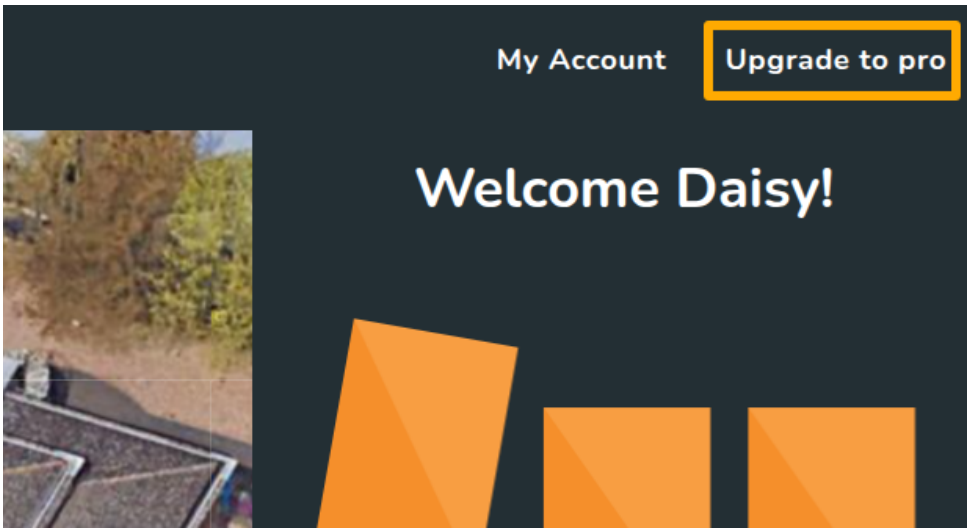
Easy PV Pro costs £35 (plus VAT) per user, per month. There is no ongoing commitment and you can cancel at any time. If you cancel your subscription it will will remain active until the end of your current subscription period. Please note, we do not offer refunds on Pro subscriptions.

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. Please do also book one of our demo webinars to see what Pro can do for you!

How do I upgrade to Pro?

Make sure you're logged into the account you would like to be the Owner of the Pro team. This Owner account cannot be changed or removed from the team. Other members of the team are added during the upgrade process.



1. Click **Upgrade to Pro** in the top right corner
2. Add team members and set their role type
3. Connect to Midsummer
4. Fill in billing details
5. Set up payment
    - easy-pv.co.ukPay via GoCardless instant bank payment
    - easy-pv.ieSet up Stripe payment

> **Note**: Some banks do not support instant payments so if you're having trouble setting up the payment, please get in touch so we can do this manually.

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

If you can't find your bank when you enter it's name, try just typing a few letters of the bank name and wait a moment to see what results come up. Sometimes the name of the bank will be slightly different to what you expect it to be. To see a list of all the banks that GoCardless (our payment partner) supports click here.

If you still can't find your bank please get into contact with us at help@easy-pv.co.uk and we'll get this sorted for you.

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.

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.

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.

- Helios - live integrations with Easy PV and Heatpunk.
- Payaca - live integrations with Easy PV and Heatpunk
- Jumptech - in development
- Zervio - 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 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.

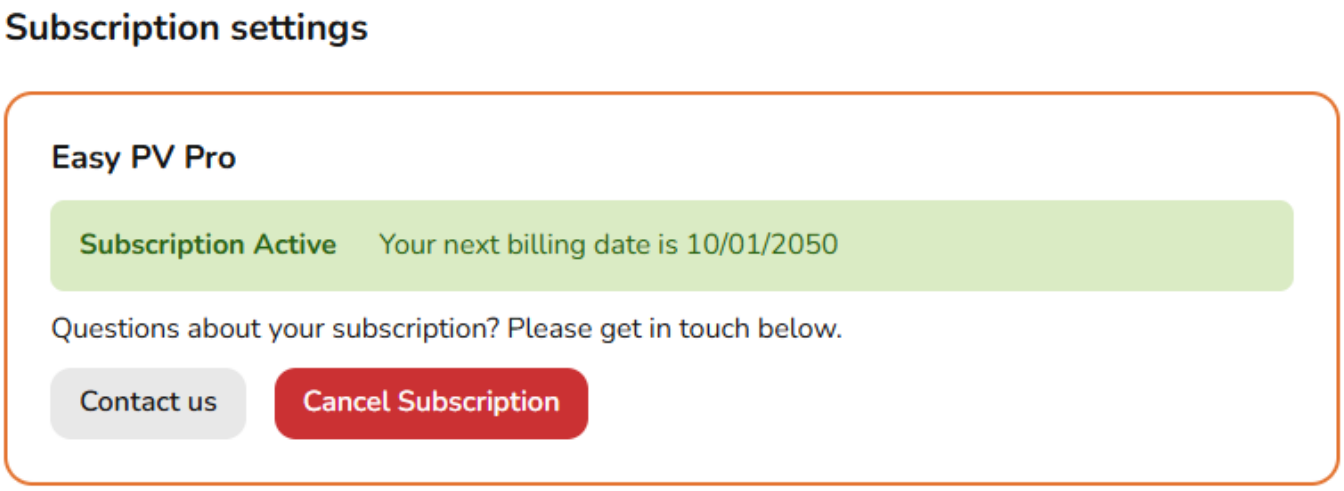
Can I get a refund if I don’t like Pro?

If you cancel your subscription it will will remain active until the end of your current subscription period. Please note, we do not offer refunds on Pro subscriptions.

How do I cancel my Pro subscription?

You can cancel your subscription at any point by logging into Easy PV and navigating to **Pro Account Settings > General** then scrolling to the bottom of the page to view your **subscription settings**. Only owners and admins of the Pro team can manage the subscription.

> If you cancel your subscription it will will remain active until the end of your current subscription period. Please note, we do not offer refunds on Pro subscriptions.



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.

Can I share projects with other people in my team?

Yes, if you have a Pro Easy PV subscription you can share projects with other members of your Pro team.

See this guide for detailed instructions: Share 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.

See this guide for detailed instructions: Share projects and components