Getting started with Pro

Introduction to Easy PV Pro

What do I get with Pro?

Intended for solar professionals, our Pro tier unlocks team collaboration and access to features that can save you time and impress your customers with a professional journey through their quote and installation.

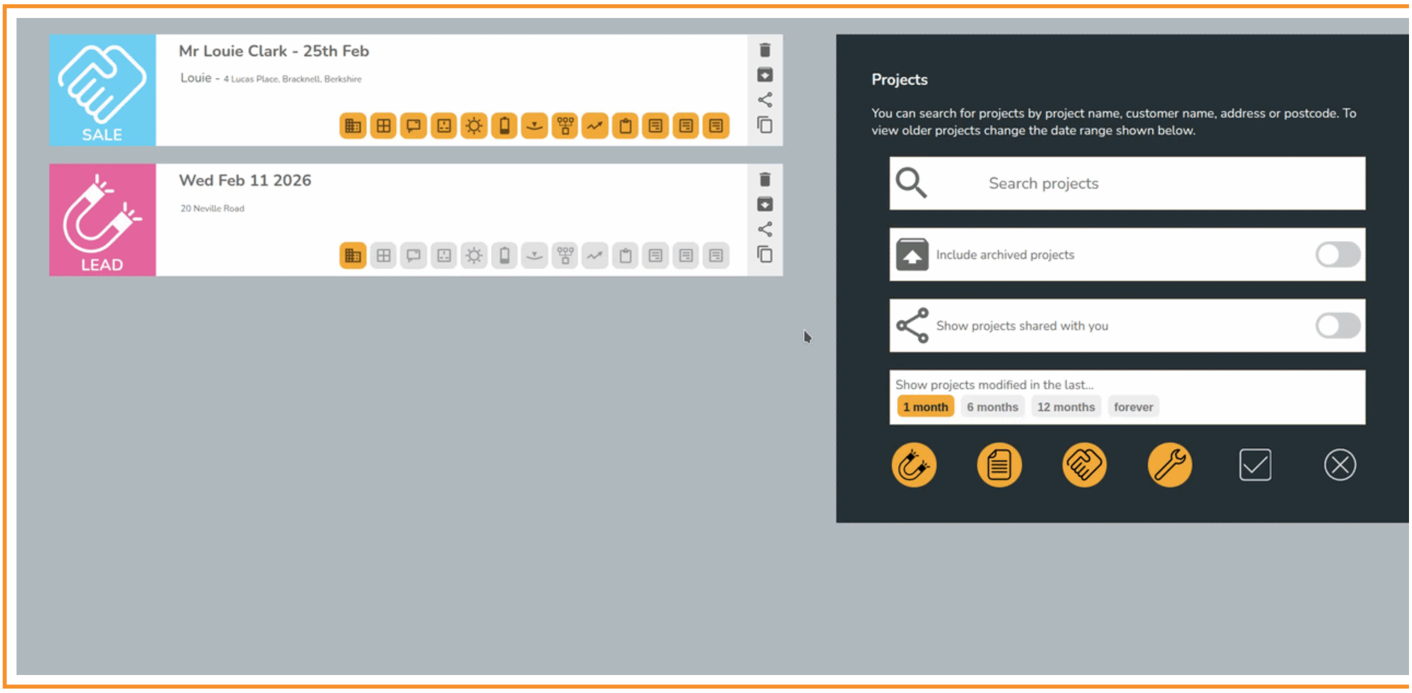
> Read more about how Pro can help your team work more efficiently.

We run **weekly free training sessions** which cover all the features that you get with Pro. Below is a summary of these features.

Team collaboration

Team management settings let you configure components, pricing, defaults and permissions for all your users. Everyone works from the same setup, which keeps designs, quotes and documents consistent and reduces rework.

Collaborate on designs with project and component sharing and stay organised with project status tracking so everyone is on the same page.



Integrated survey functionality

Pre-installation survey: Complete a standardised survey directly within the project, ensuring required information and photos are captured consistently and passed cleanly to the design and installation teams.

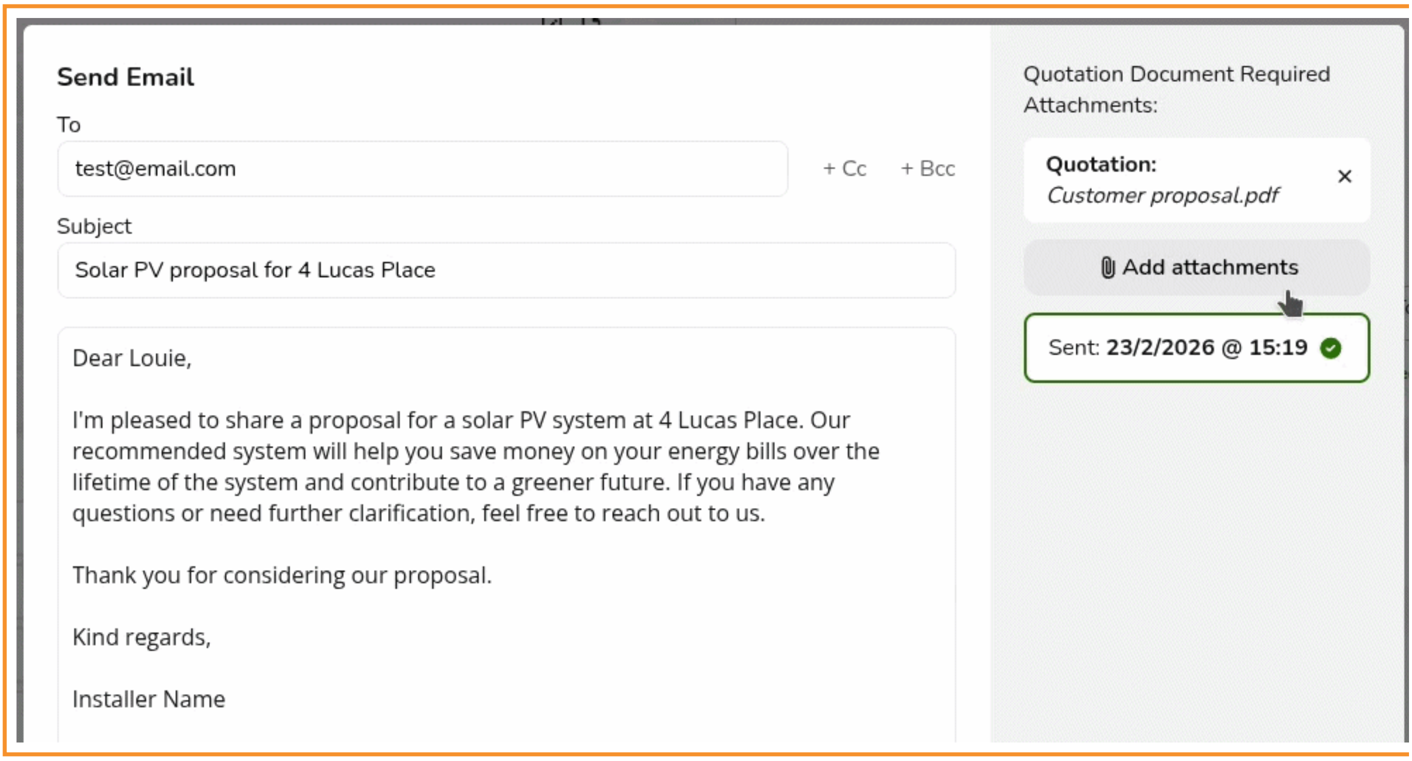
Installation record: Create a consistent, auditable photographic record of what was installed, how it was configured and site-specific notes needed for future maintenance or customer support.

Read more about Easy PV's survey functionality.

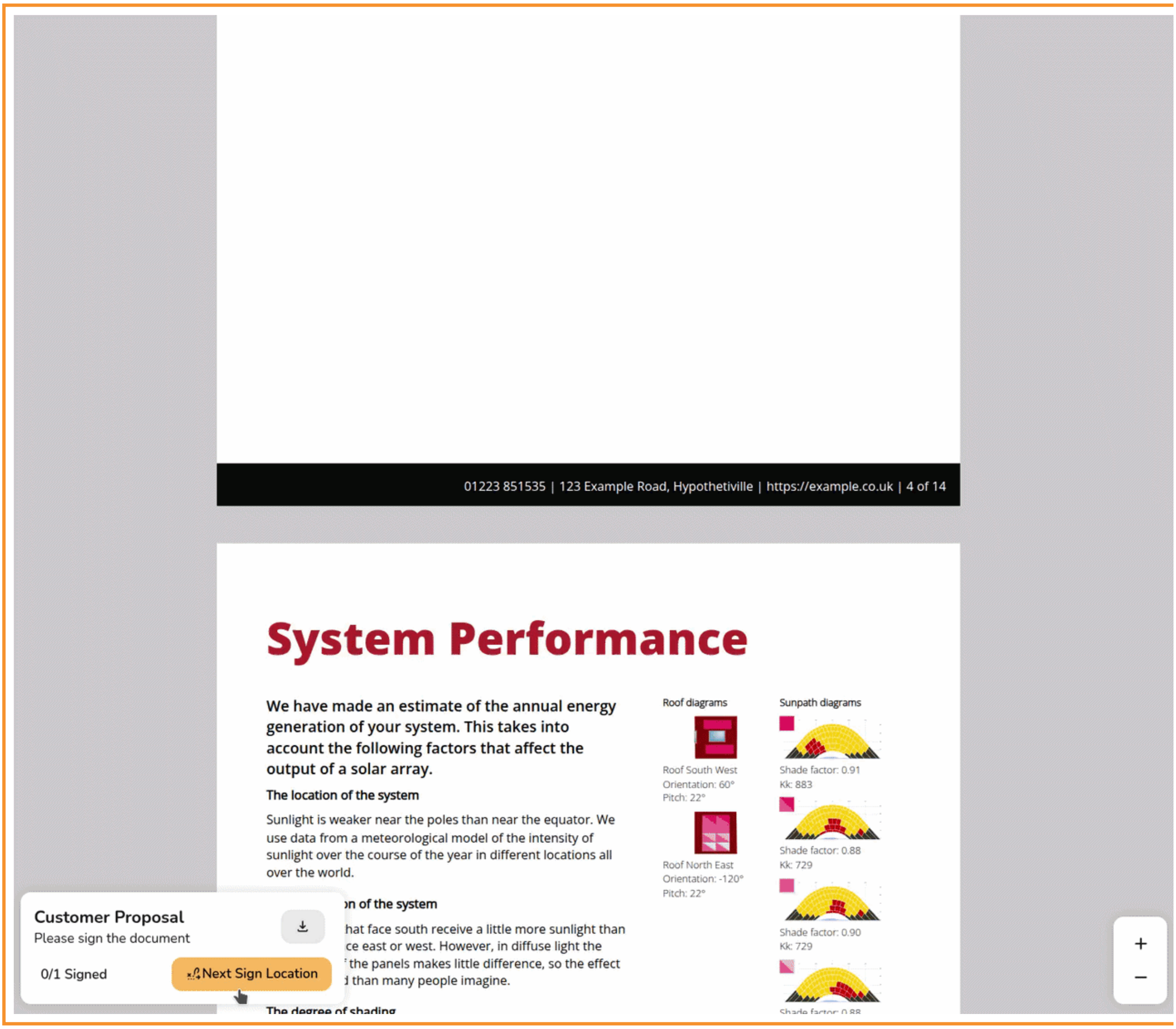
Professional proposals and document management

Manage additional documents required for the sale, like letters of consent, scaffolding request forms, etc., using project document storage. All project files – surveys, proposals, reports, customer documents – can be stored in one place, with no need for a separate QMS system.

These documents can be attached to emails sent through Easy PV using integrated emailing functionality.



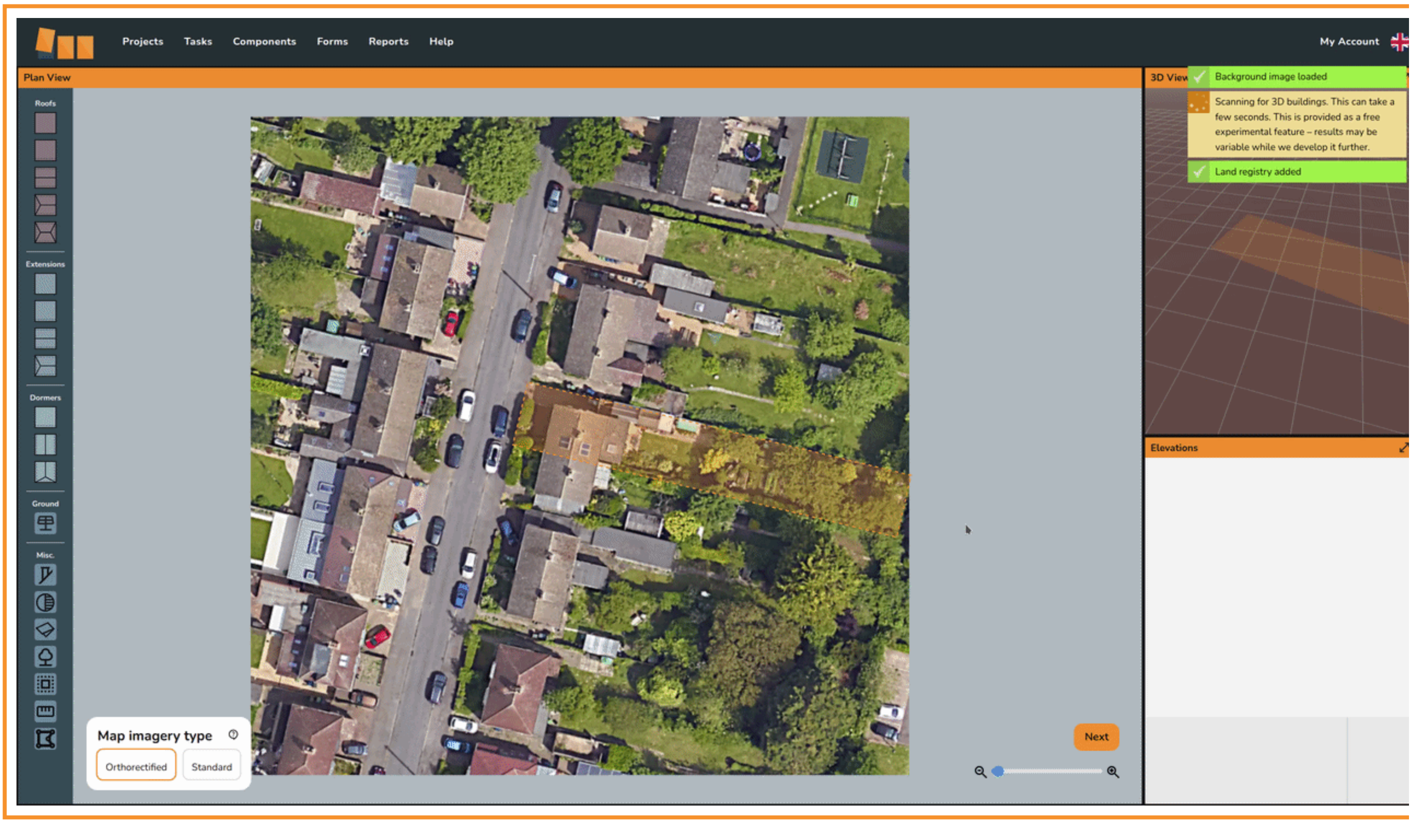
Give your customers a professional experience with a customised customer proposal. Add a cover page, apply your branding and configure cover letters, terms and more so every proposal is consistent. Send this proposal and any other necessary documents for e-signing directly through Easy PV.



Speed up designs from start to finish

Generate and qualify leads with Speedy PV. Speedy PV (a paid add-on) lets customers design their own system on your website and request a follow-up. Manage leads via Easy PV and convert them to a full project in a single click.

Get unlimited access to Easy PV's **magic design mode**, one of four design modes available in Easy PV. Magic designs will automatically generate a 3D model based on aerial data, which can then be adjusted for accuracy. Watch the same property be designed using 3D and magic mode to see how this can speed up your designs.



Speed up DNO applications using [ENA Connect Direct] integration. Project and survey information is pre-populated to reduce manual entry, cut down on mistakes and help ensure applications are submitted correctly the first time. Track the status of your application via emails from the DNO and in the project overview in your Easy PV project.

Integration with other tools

Connect Easy PV directly with the other systems your business relies on using our open APIs. You can push customer or lead information into Easy PV to create projects automatically and pull project data and documents from Easy PV into your CRM.

Getting started

The cost is £35 / month (plus VAT) per user. Get in touch if you're interested in a free trial.

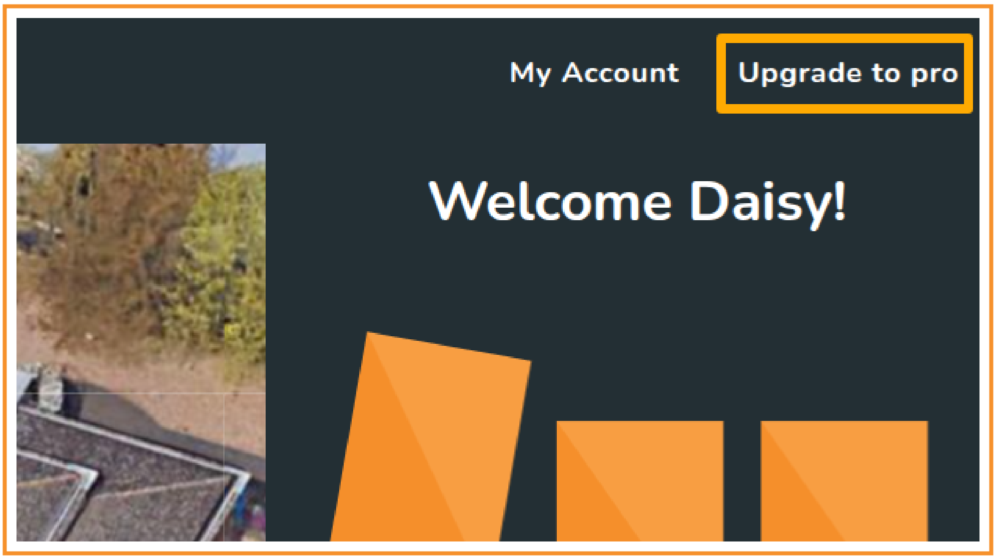
Get started with Pro using our detailed setup guide.

If you have further questions about Pro, please attend an online training session, have a look at our pro FAQs or get in touch!

Setting up your Easy PV Pro account

How do I upgrade to Pro?

Click **Upgrade to Pro** in the top right corner, while 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.

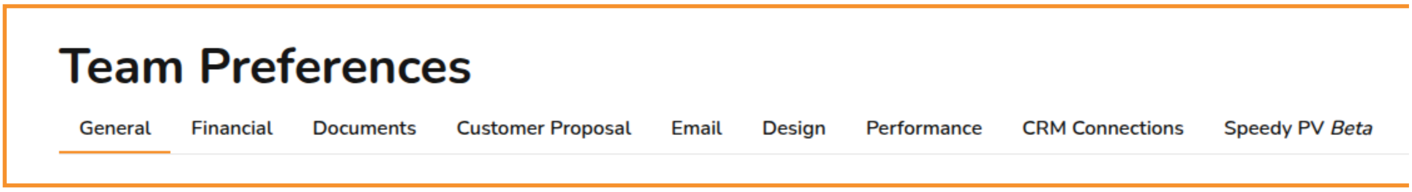


1. Click Upgrade to Pro in the top right corner
2. Add team members and set their role type
3. Connect to Midsummer so your pricing correctly applies to the team
4. Fill in billing details
5. Pay via GoCardless instant bank payment

> 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.

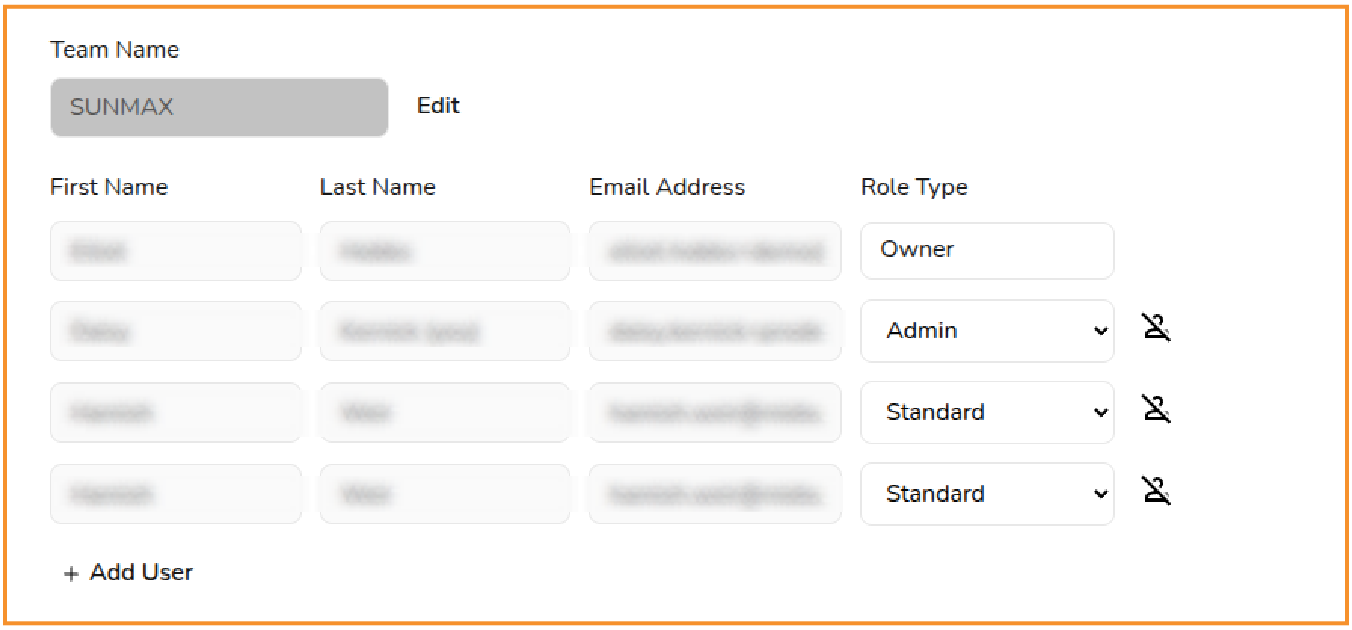
Configure team settings

Correctly setting up your team preferences can help you make the most of Easy PV Pro. Navigate to **Pro account settings** and click through each tab to set this up. Find further information in each section below.

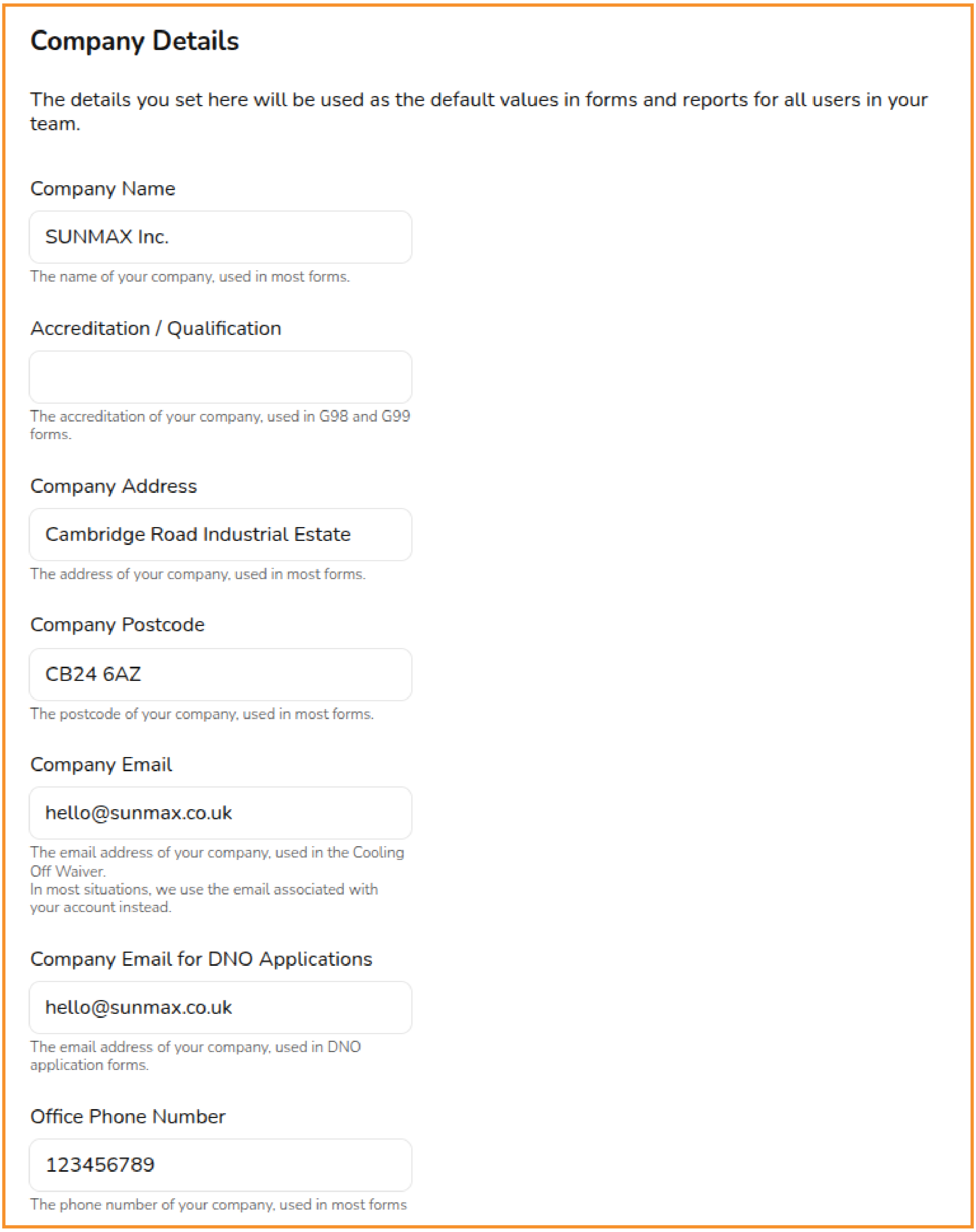


1. General

If you have multiple users in your team, you can edit team members and what role they have here. Read more about [Pro team management and user roles](#).



The details you set under **Company Details** will be used throughout Easy PV tasks, forms, and reports.

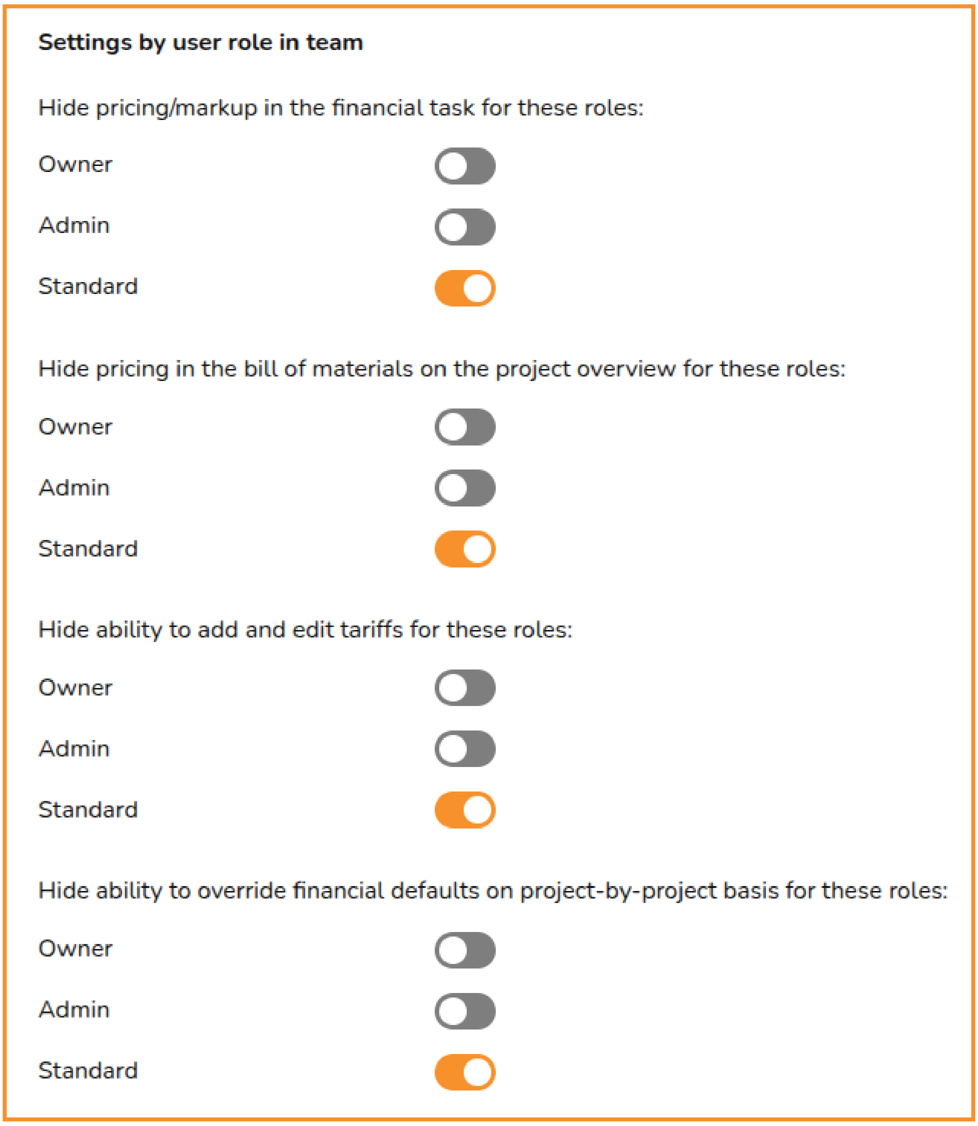


At the bottom of this section you can view and change your subscription status.

2. Configuring financial settings

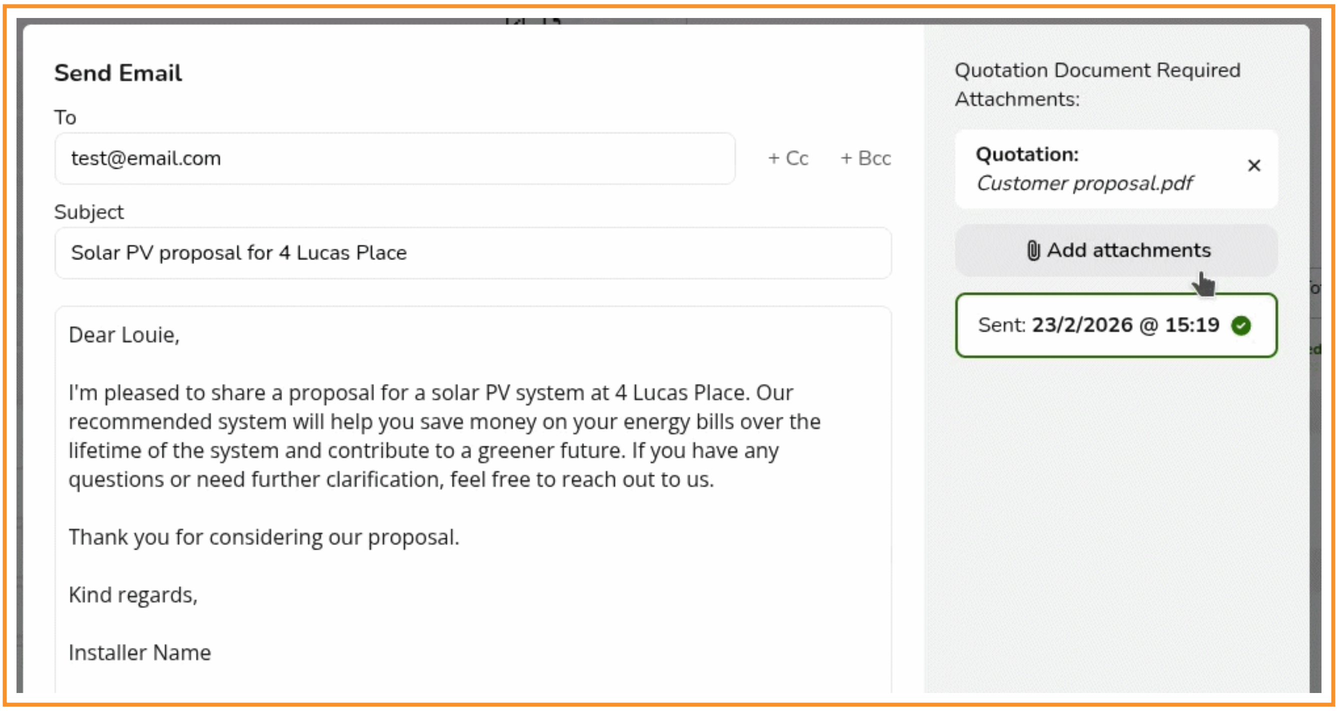
In the **Financial** tab you can configure **financial defaults for your team**. Many of these settings are the same as those available in user settings. Team financial settings override user financial settings and apply consistently across your team's projects. Read about [configuring financial settings] for more information on the options available.

As a Pro user, you have the additional option of limiting the financial information available on a project for certain users in the team. Simply toggle on who you would like the setting to apply to based on their user role.



3. Upload team documents

Any files uploaded to the documents tab will be accessible to any user in the team when sending emails through Easy PV. Upload your terms and conditions, MCS certificate or anything else you would like available for all projects.



4. Set up customised proposal

With Easy PV Pro you have the option to customise the customer proposal to align more with your branding. Read more about setting up your customised proposal.

5. Configure email credentials

With Easy PV Pro you can send emails to your customer within projects. By setting up your email credentials, it means these emails will send from your domain, rather than from no-reply@easy-pv.co.uk.

Read more on how to set up email credentials.

6. Design

Adjust the default roof margin for new projects.

7. Performance

Adjust the defaults used in the performance task. Read more about these here.

8. CRM connections

In this tab you can access your API key to connect with CRMs and job management platforms.

See what existing integrations we have or take a look at our developer guidelines if you would like to set up your own integration.

9. Speedy PV

If you're interested in setting up Speedy PV, enable the Speedy PV configuration dashboard.

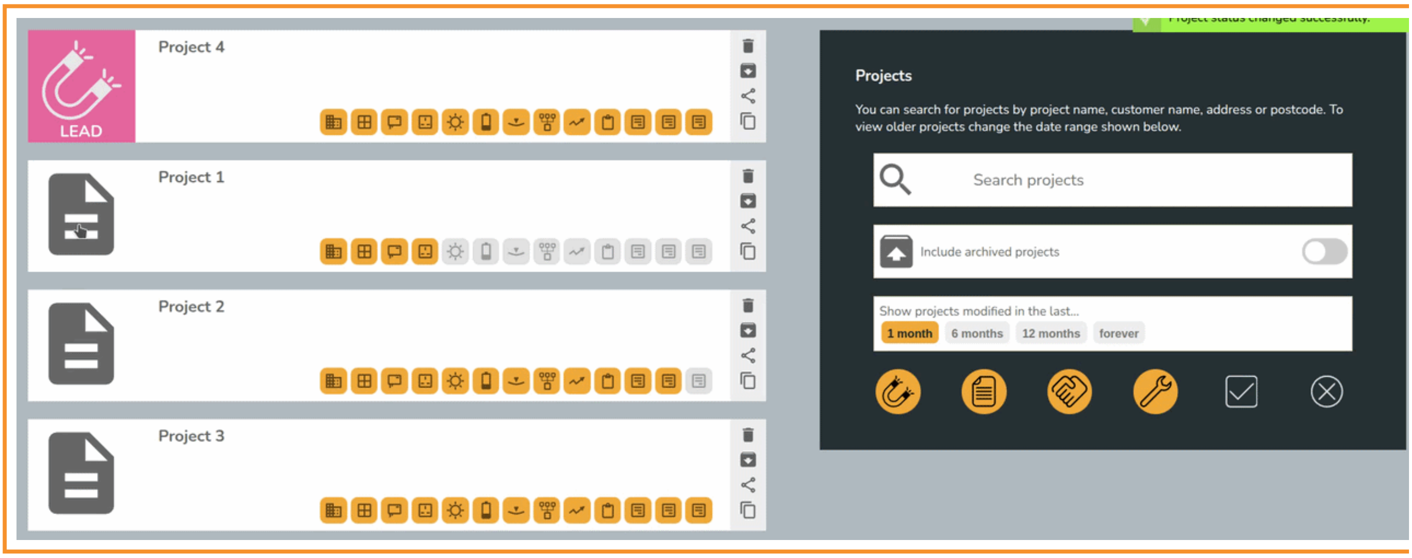
Read more about setting up Speedy PV.

Getting start with Pro features in a project

Once you've configured your Pro account settings, you can get started using Pro features within a project.

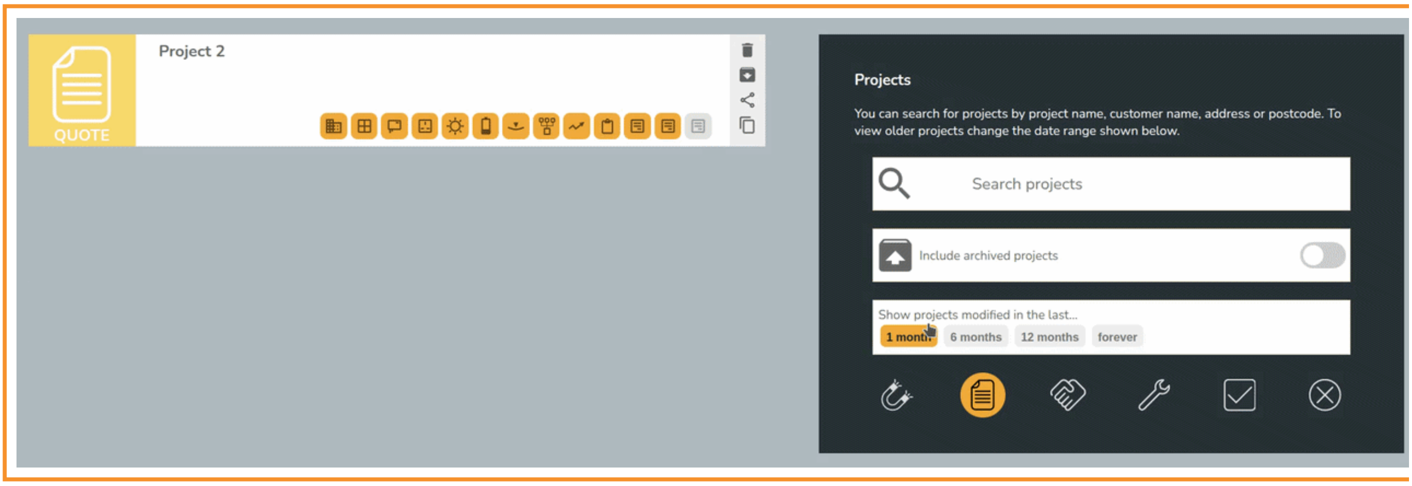
Project statuses

From the project overview, you'll now be able to set the status on your project. Use filters on the right-hand side to view jobs in each stage.



Project and component sharing

Old projects and components will not be shared with your team by default. Any old projects you'd like shared with your Pro team, you can share manually. If you'd like all old projects or components to be bulk shared get in touch and we can do this for you.



If you'd like new projects or components shared by default, navigate to **My account** > **Preferences** > **General** and then **Default sharing**. Select the permissions you'd like to be given by default on new projects. These settings are account (not team) specific so will only apply to the account you are logged into.

Read more about sharing.

Using project features

Read more about the Pro features you can now use in projects:

- E-signing
- Document storage
- Sending emails
- Survey and install records
- DNO applications via Connect Direct

If you have further questions about Pro please attend an online training session, have a look at our Pro FAQs or get in touch!

Pro: Share projects and components

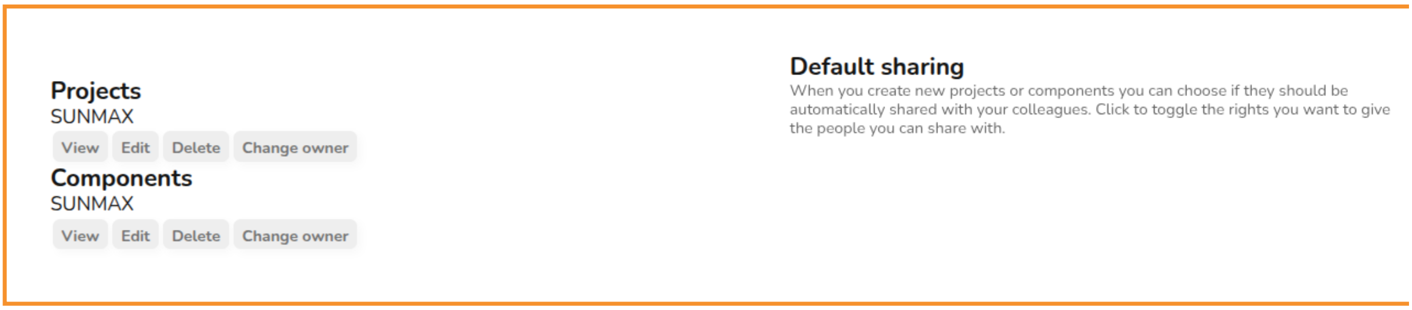
> This guide applies to **pro** versions of Easy PV. Read more about what you gain with pro.

With Easy PV pro you're able to collaborate with your team by sharing projects and components. See below how you can configure your sharing settings.

Default sharing

Each user in a Pro team can configure default sharing settings for the projects and components they create. Navigate to **My account** > **Preferences** > **General** and then **Default sharing.**

In this section, simply select which sharing permissions you would like to be granted automatically when creating a project or component.



> This will only apply to new projects. If you would like to share old projects, see below for instructions on manual sharing.

Manual sharing

If you would not like projects or components to share by default, you also have the option to share individual projects or components manually. You will also have the option to transfer ownership to another user when sharing manually.

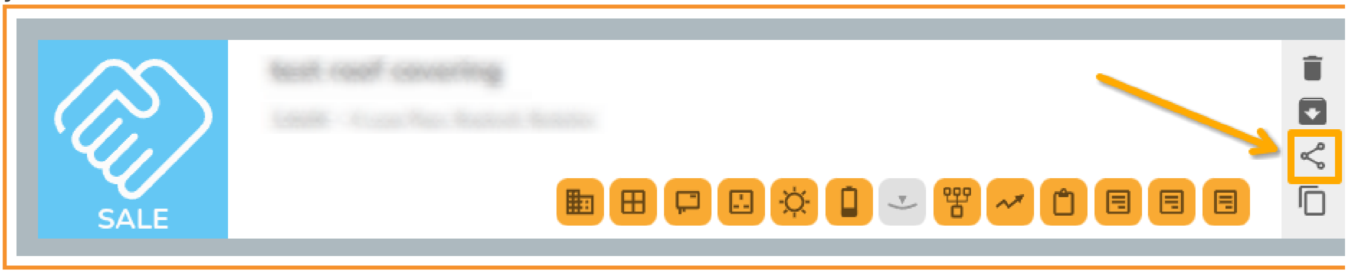
> You can only configure sharing permissions on projects and components owned by you.

Sharing a project or component

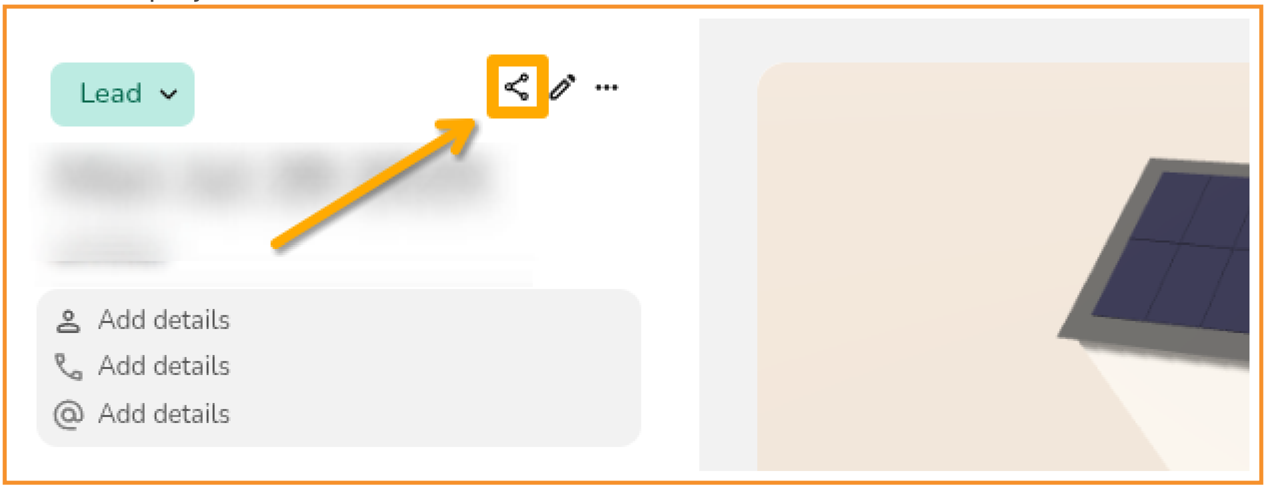
Project sharing

You can share a project via your list of projects on the My Projects page, or via the project overview page on a specific project.

- From your project list on the **My Projects** page - click on the share icon on the project you want to share



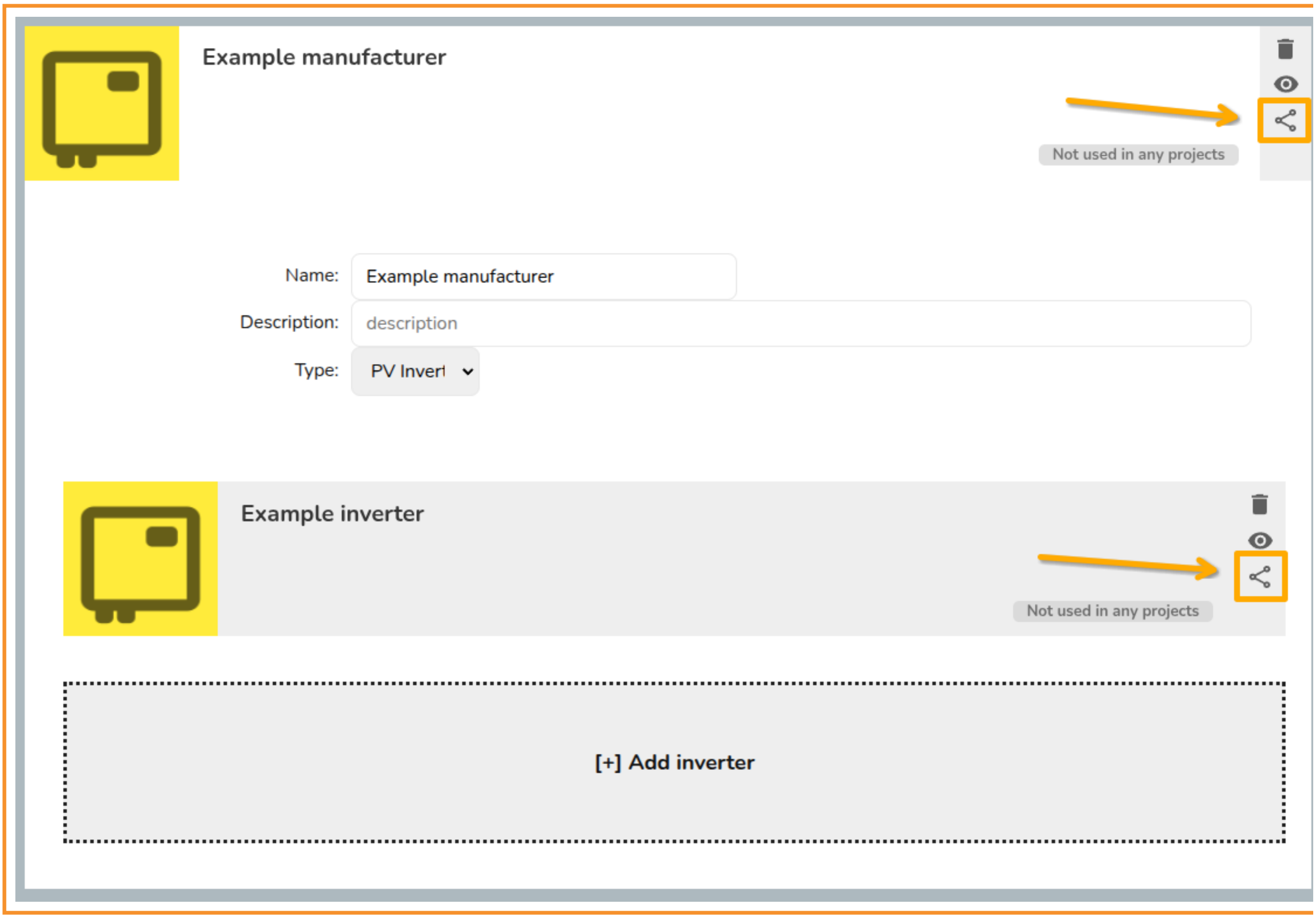
- From the **project overview** page of a specific project - click on the share icon in the top left of the project.



Component sharing

If you are using custom components in Easy PV, you can share those owned by you with other members of your team. Hover over the Components option in the main site navigation and then select the component type to find the component you want to share. Click on the share icon to configure sharing for the component.

> For custom inverters and solar panels, you need to share both the manufacturer group and the individual component.

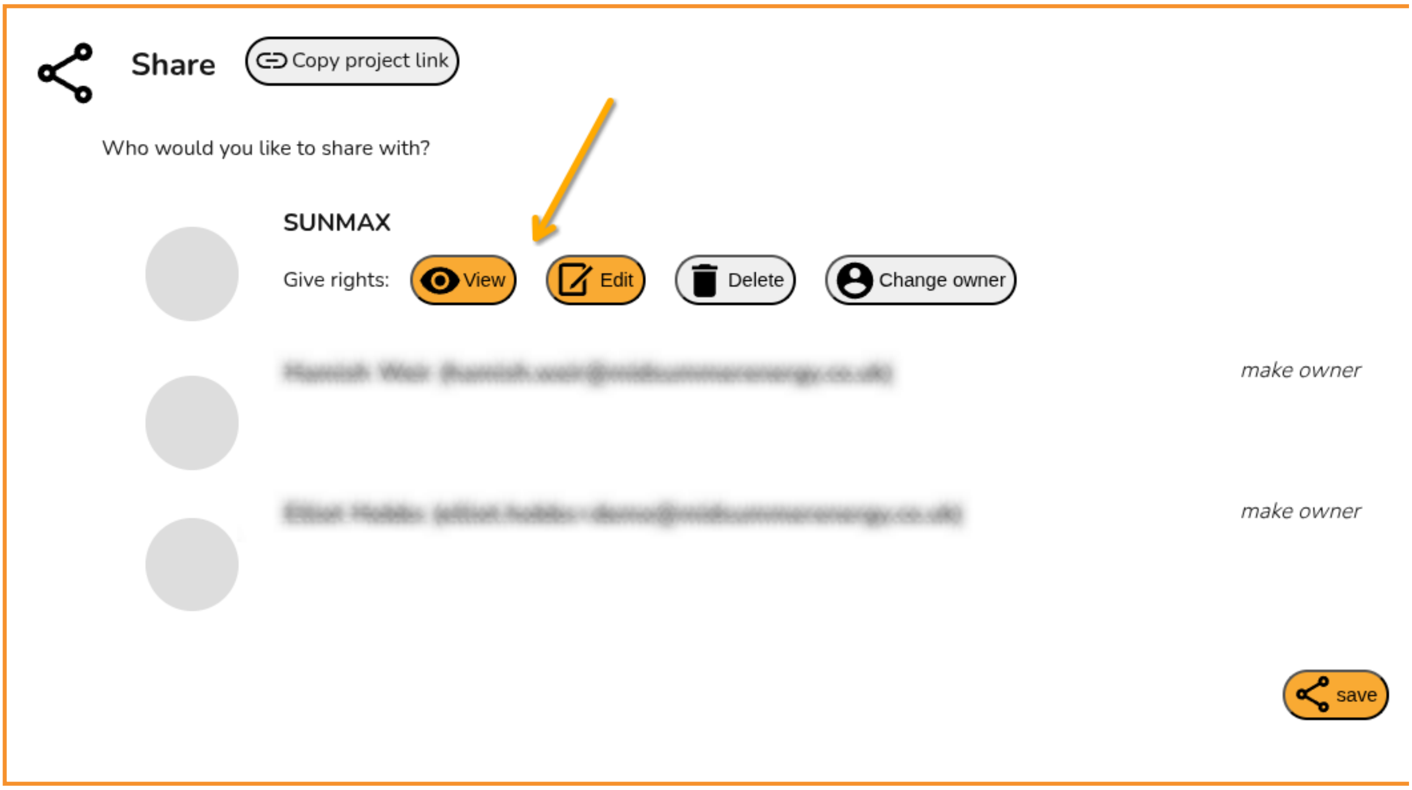


Selecting which permissions to give

Once you have chosen the project or component you want to share, you can then **select the team** you want to share with and **set the permissions** you want to apply. Click **save** in the bottom right corner. If you have lots of members in your team, you may need to scroll down to see the save option.

If you want to change ownership of the product or component, click on the **make owner** button beside the name of an individual user in your team. This will assign ownership to that user and you will no longer have permissions to configure sharing.

Once you have shared a project with a user, you can use the **copy project link** button to get the URL of the project to share directly.



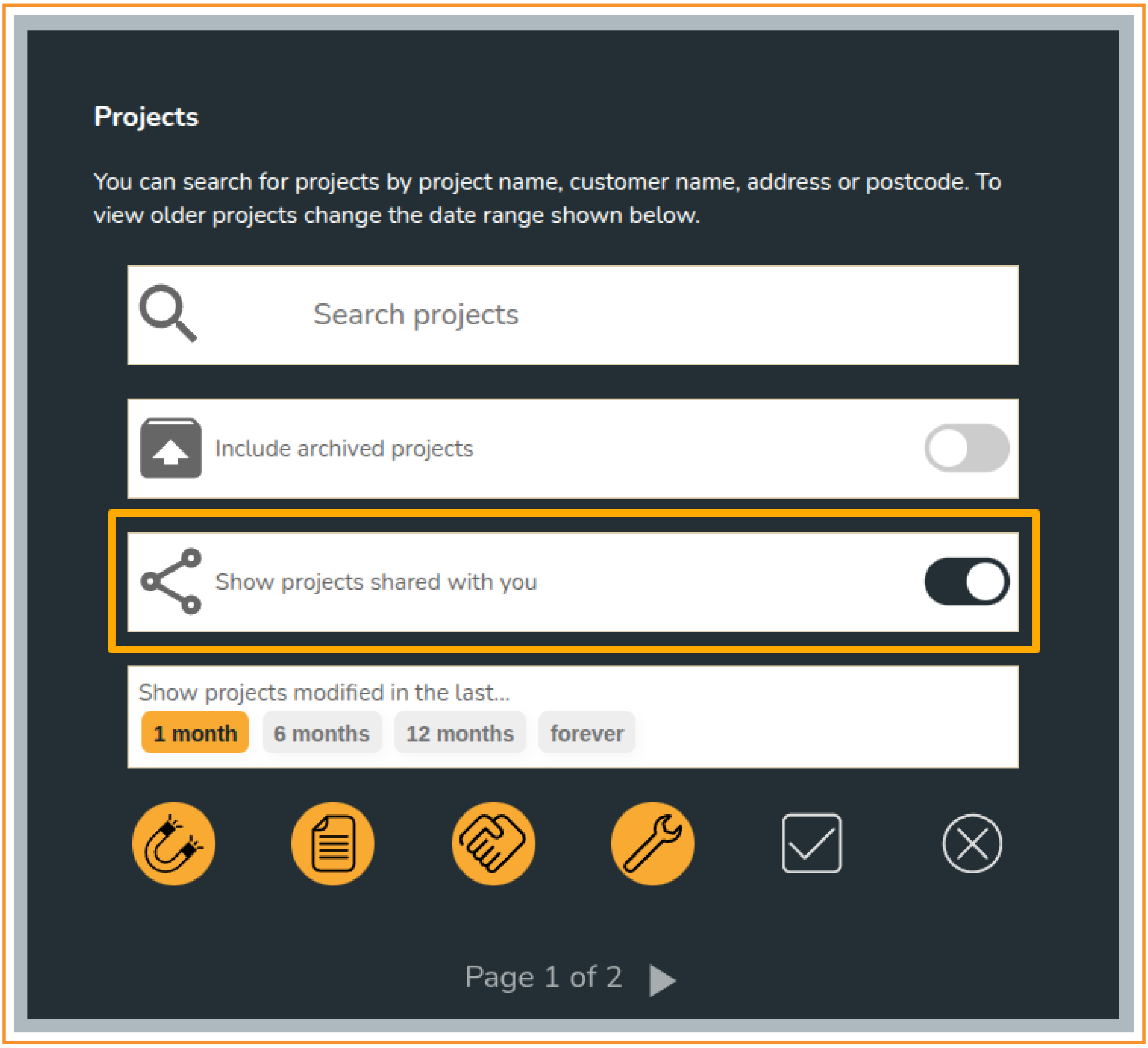
Understanding sharing options

You will have the following options when sharing projects and components in Easy PV:

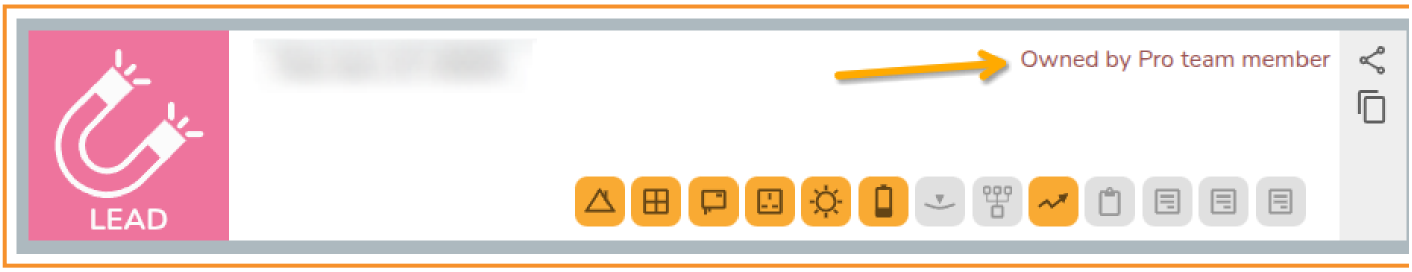
- **View:** users will be able to view projects or use the component, but not edit it.
- **Edit:** users will be able to make changes to the project or component.
- **Delete:** users will be able to permanently delete the project or component.
- **Change owner:** users will be able to transfer ownership of the project or component to another user.

Viewing projects shared with you

To view projects shared with you, make sure this option is selected in the project list page:



Projects owned by others will say *Owned by [name]* in the top right corner of the project:



If you're having trouble with any of these permissions, get in touch with our support team on help@easy-pv.co.uk or help@easy-pv.ie!

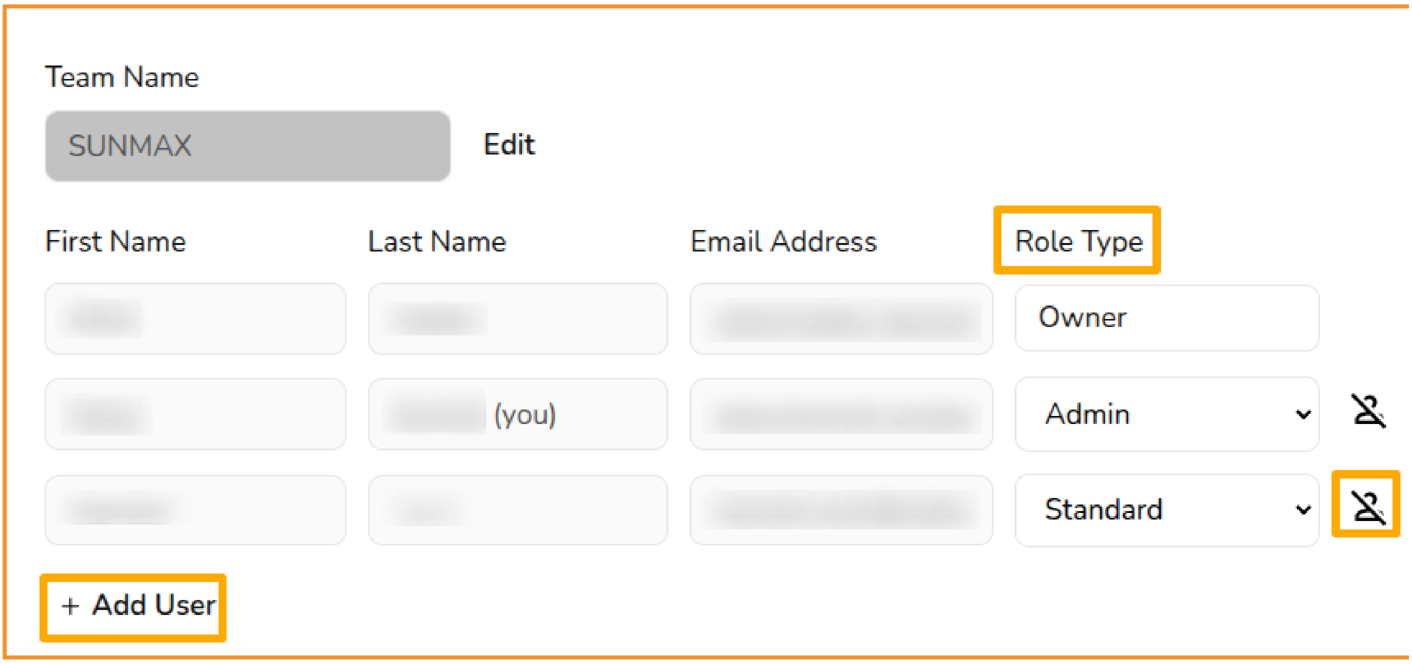
Pro: Team Management

This guide applies to **pro** versions of Easy PV. Read more about what you gain with pro.

Team management allows you to have control over who is on your Easy PV Team and the permissions (role type) they have.

Managing your team

You can manage your team settings in **Pro Account Settings** > **General**. The team owner and any users with the admin role type can add and remove users, as well as change their role type.



Role types

With Easy PV pro, different members of the team can have different levels of access. The roles available are:

- **Admin**: role includes the ability to view and manage Pro team settings.
- **Owner**: this is the user who set up the pro team and this role cannot be selected or changed. They have same permissions as admin but cannot be removed from the team, so make sure this is under an email address you can access even if the owner was to

leave the company.
- **Standard**: can access all pro features within projects, but cannot view or edit the pro account settings.

Adding or removing users

To **add users**, you'll need the individual's name and email address (they do not need an existing Easy PV account). You can then choose the user's role. This role can be changed at anytime.

> The cost for adding a new user will be proportional to how much time is left until your next charge date and subsequent direct debits will be automatically updated.

To **remove a user**, click on the icon beside their details. This will disable their account and remove them from the subscription. The owner account cannot be removed so ensure it is under a company email address.

Editing users

User names or email addresses cannot be edited here. This can only be done while logged into the relevant account. If you've made a typo when adding a new user to your team, get in touch with the support team.

See here for information on sharing projects and components between team members. If you are having any issues with editing your team members, please get in touch at help@easy-pv.co.uk or help@easy-pv.ie!

Pro: Company details and subscription settings

This guide applies to **pro** versions of Easy PV. Read more about what you gain with pro.

You can manage your company details and subscription settings in **Pro Account Settings** > **General**.

Company details

You can set default information that will be used across all your team's user accounts. This includes company name, number, accreditation, logo, address, and postcode.

The details you set here will be used where relevant throughout Easy PV tasks, forms, and reports.

Billing information

Here you enter the details we should use for billing your subscription. If you have a separate accounts department, you may wish to use their email address here.

We send out invoices by email every month after your subscription payment has been taken.

Subscription status

At the bottom of this section you will see your subscription status with your next billing date listed.

Cancelling your subscription

In the bottom right, you'll see the option to **Cancel Subscription**. This will cancel your subscription and your team's accounts will switch back to standard on the date your subscription would have renewed.

Please reach out to our support team if you're having any issues or would like to change your billing details at help@easy-pv.co.uk or help@easy-pv.ie!

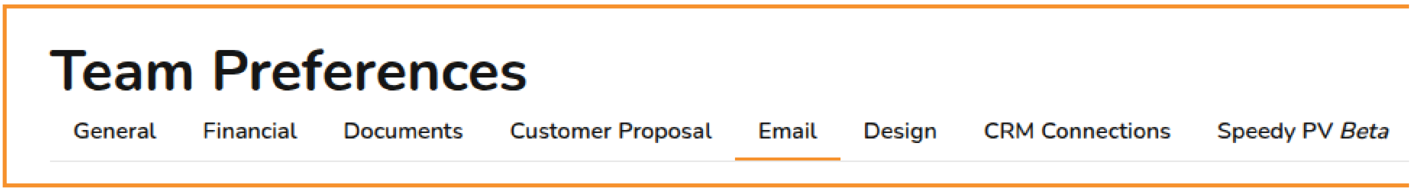
Pro: Email Credentials

This guide applies to **pro** versions of Easy PV. Read more about what you gain with pro.

With Easy PV pro you can send emails to your customer within projects, by setting up your email credentials it means these emails will send from your domain, rather than from no-reply@easy-pv.co.uk.

Email configuration

To edit your email settings navigate to **Pro account settings** > **Email**



Here you can enter email credentials to allow emails to be sent from your own email address, how this is set up will depend on what email provider you are using.

OAuth 2.0 - Gmail or Microsoft 365

If Gmail or Microsoft 365 is your email provider, then simply select **OAuth 2.0**, select the relevant option and click connect, this will direct you to your email where you can approve the connection.

Once it is linked, you can send a test email to make sure it's working as intended.

SMTP

If you have a different email provider then you will need to set up using the **SMTP** option.

What is then required for each field depends on the provider and you will likely be able to find instructions online by searching for **your provider** and **SMTP credentials**. Below is some general guidance for each field

SMTP Username	These credentials are provided by your email service provider and are used to authenticate your email client. In most cases this is your full email adress (e.g. user@provider.com)
SMTP From Address	**Optional**: This is the email address that recipients see as the sender of the email. In most cases this will be the same as the SMTP username
SMTP Name	**Optional**: this will appear next to the 'from address'
SMTP Host	This will vary depending on provider. The format will be something like smtp.provider.com
SMTP Password	This will usually be an **App Password** that you need to set up but in some cases it will be your email password
SMTP Port	**Optional**: by default this will be 587 but in some cases this will need to be changed

Once all required fields are filled in, click save credentials, you can then send a test email to make sure it's working as intended.

If you are having trouble, please contact support on help@easy-pv.co.uk or help@easy-pv.ie.
Please let us know what provider you are using and a screenshot of the email page with your inputs (do not share your password).

Pro: Customer Proposal Customisation

This guide applies to **pro** versions of Easy PV. Read more about what you gain with pro.

With Easy PV Pro, you are able to customise the proposal document that you send to your customers. This can help you stand out and align the proposal more with your branding!

What can I customise?

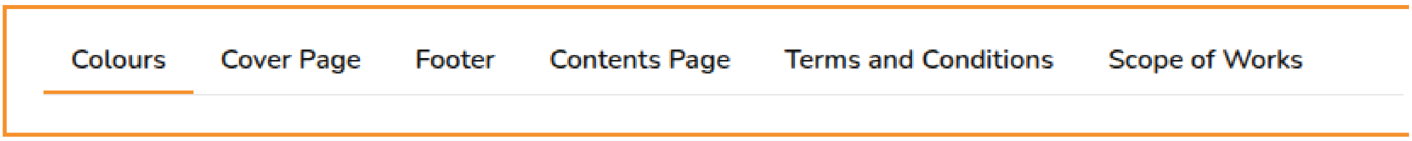
You have the option to:

- Add a custom cover page.
- Customise colours to match your brand.
- Add an 'About us' section to the contents page.
- Configure a branded footer to appear on all pages of the proposal document with your logo and company information.
- Add your terms and conditions and the scope of work sections to the proposal.

If you want further customisation of the proposal or want us to create a document entirely to your own specification, please contact us about our **Enterprise package** on help@easy-pv.co.uk or help@easy-pv.ie.

Setting up

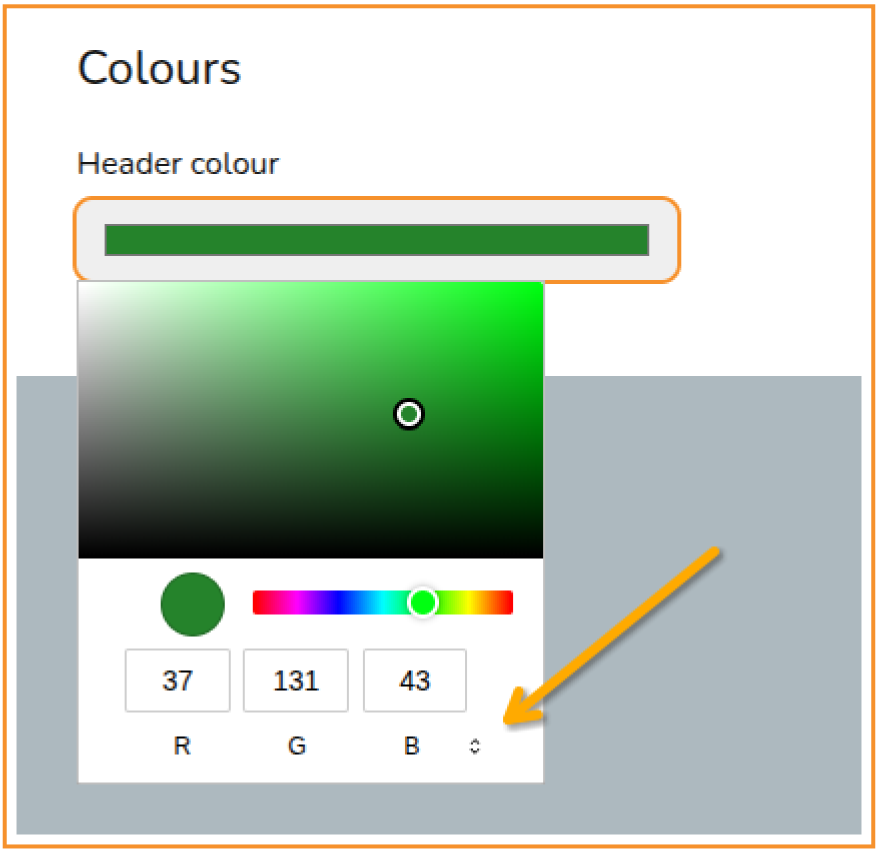
Navigate to **Pro account setting** > **Proposal**. There will also be an **Uploads** section in your Pro account settings where you can manage all the images you upload.



Colours

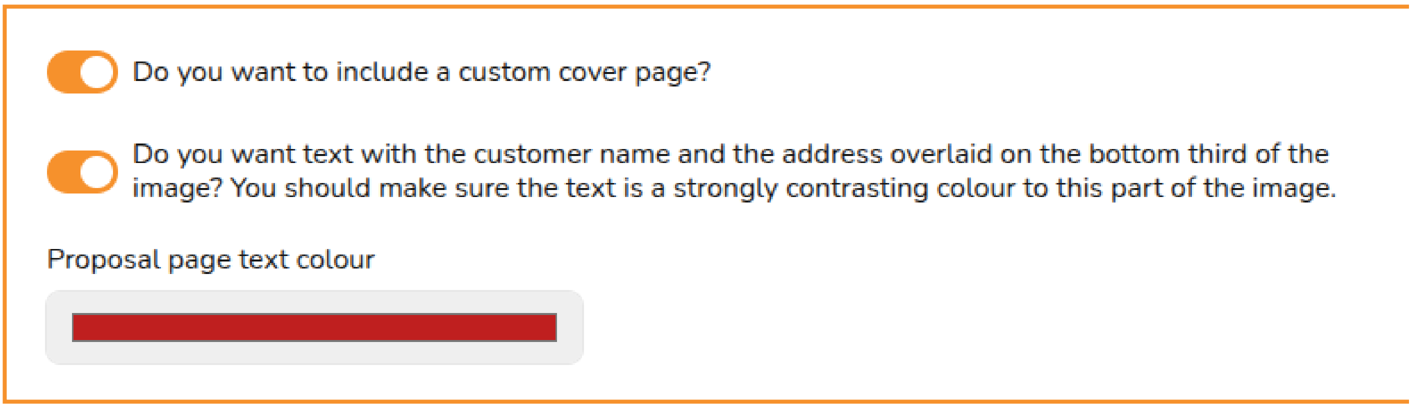
Select the colour you would like **headers** to appear in the proposal document.

You can precisely match this with your branding colours by typing in directly the RGB, HSL or HEX code, use the arrows to navigate between these options.



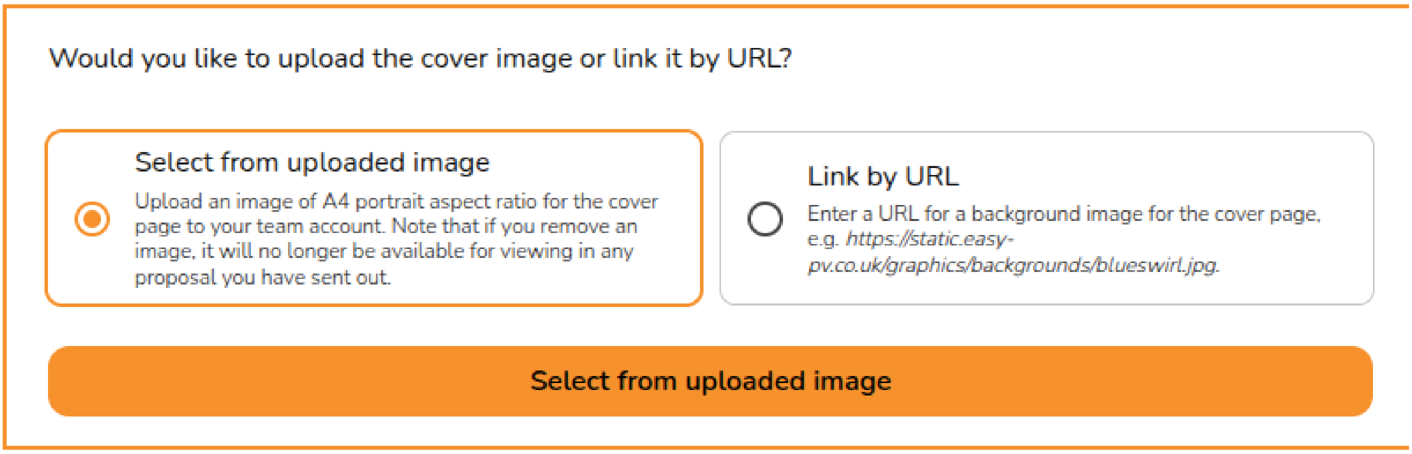
Cover page

Select whether you would like to include a custom cover page and whether you would like the customer name and address overlaid on your cover page and what colour you'd like this text to be.



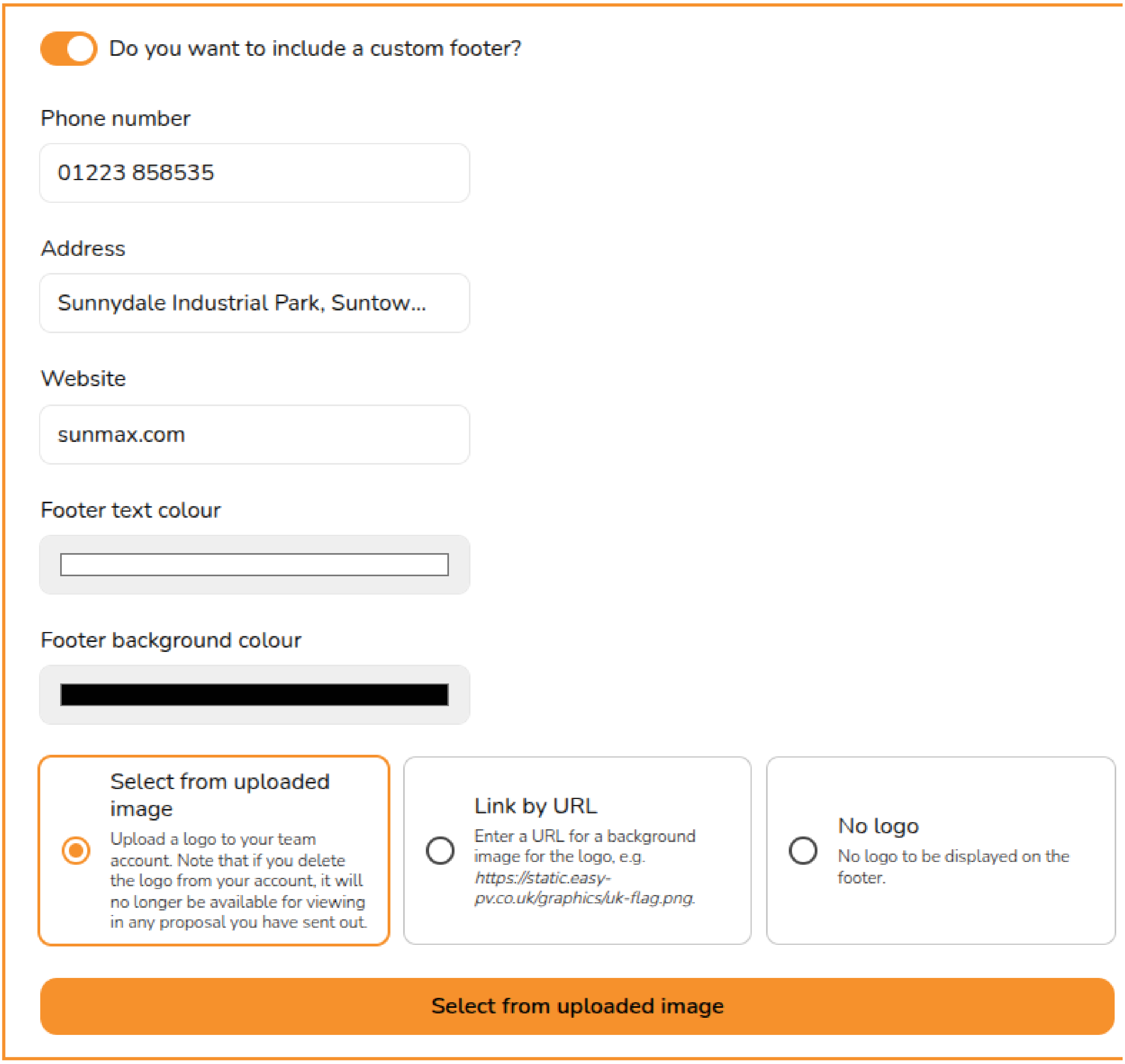
> If you don't already have a preferred way of making a cover page, you might find Canva useful. We have created a template with some additional instructions that you can use to create your own cover page design in Canva. When you are finished, click Share, then download, change the file type to PNG or JPG and download.

Once you have your custom cover page, either add it in the **Uploads** tab or in the cover page section click **Select from uploaded image** > **Add images**. After uploading you will be able to select your cover page. You also have the option to use an image from a URL.



Footer

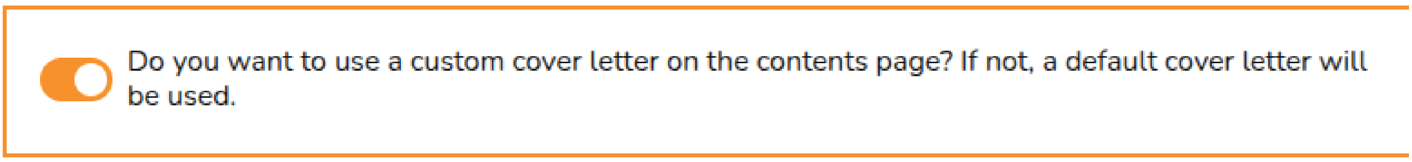
In your custom footer you can input a phone number, address and website. You can also select the footer background and text colour and upload a logo.



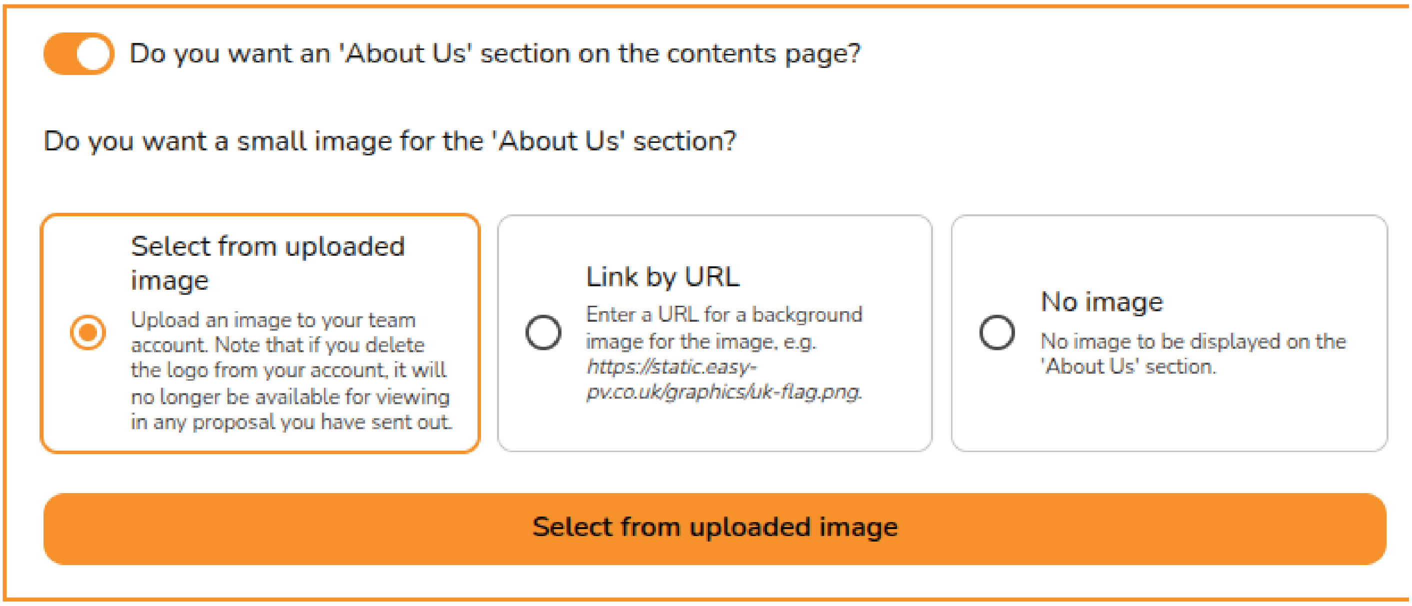
Make sure the footer text does not overflow onto a second line when you generate the proposal or this will cause formatting errors.

Contents page

In this section you can add a custom cover letter with a custom header and contents. This can be overridden on a per-project basis.

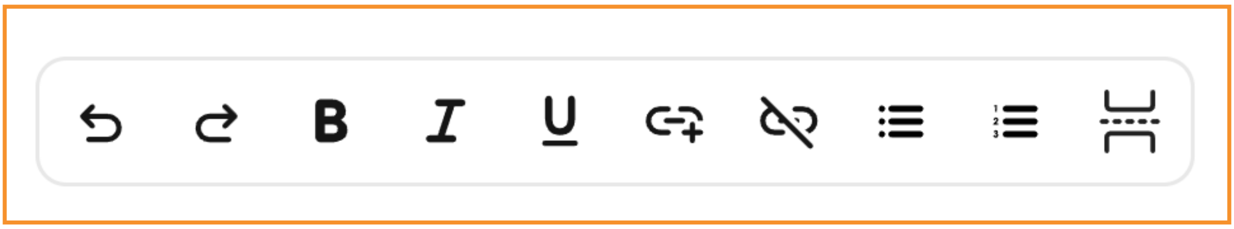


You can also include an 'About us' section with an optional custom image. The 'About us' section should be a short description, make sure it does not overflow onto the next page of the proposal.



Terms and conditions and scope of work

Here you can input your terms and conditions and scope of work. In each case you can use the options at the bottom of the text box to format the text:



Both these options can be overridden on a project by project basis.

> Changes made to the contents page, terms and conditions and scope of work will **not** automatically refresh in projects where you've already opened the customer proposal task. Click the refresh icon next to where it says 'Customer proposal' to reset those fields to what you've got in your settings.

If you have any additional questions about the customisation options or are having issues setting yours up, please reach out to our support team on help@easy-pv.co.uk or help@easy-pv.ie!