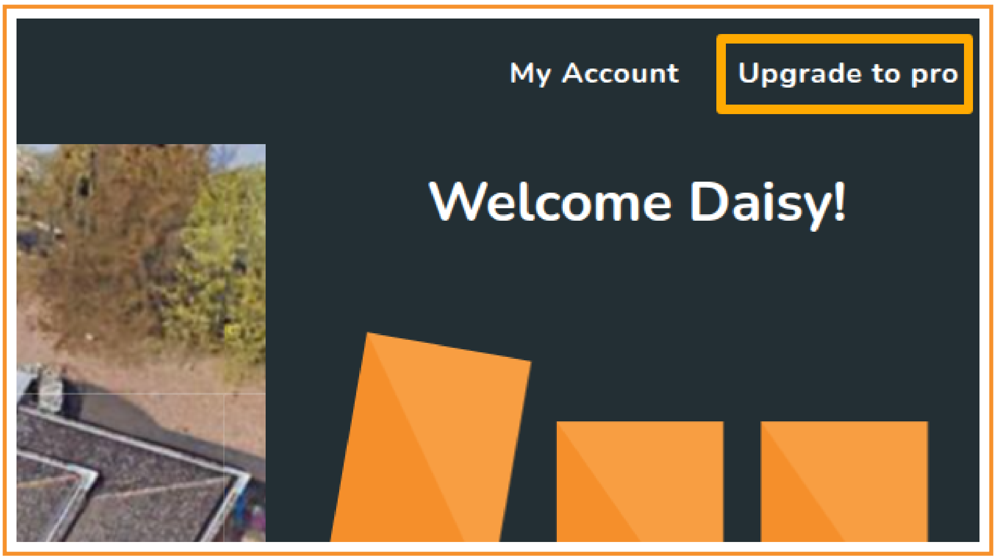
Setting up your Easy PV Pro account

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.

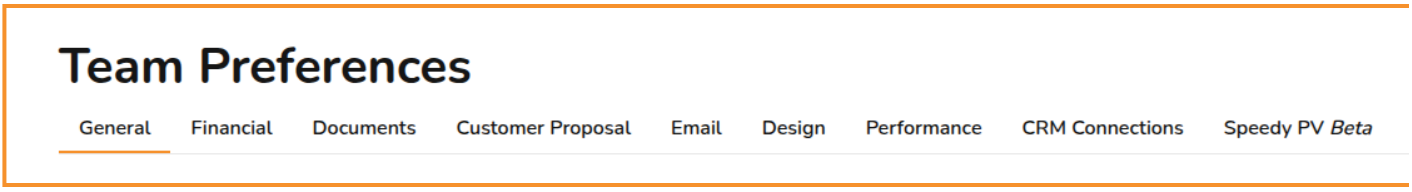


1. Click Upgrade to Pro in the top right corner
2. Add team members and set their role type
3. Connect to Midsummer so your pricing correctly applies to the team
4. Fill in billing details
5. Pay via GoCardless instant bank payment

> 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.

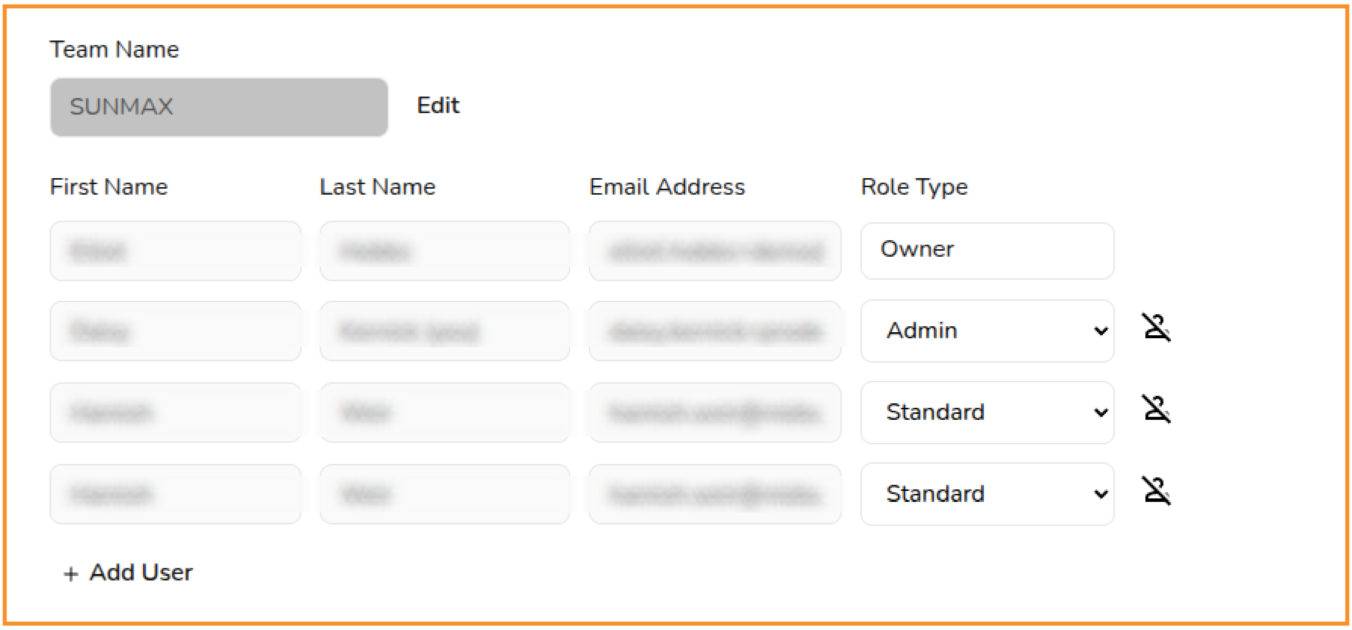
Configure team settings

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.

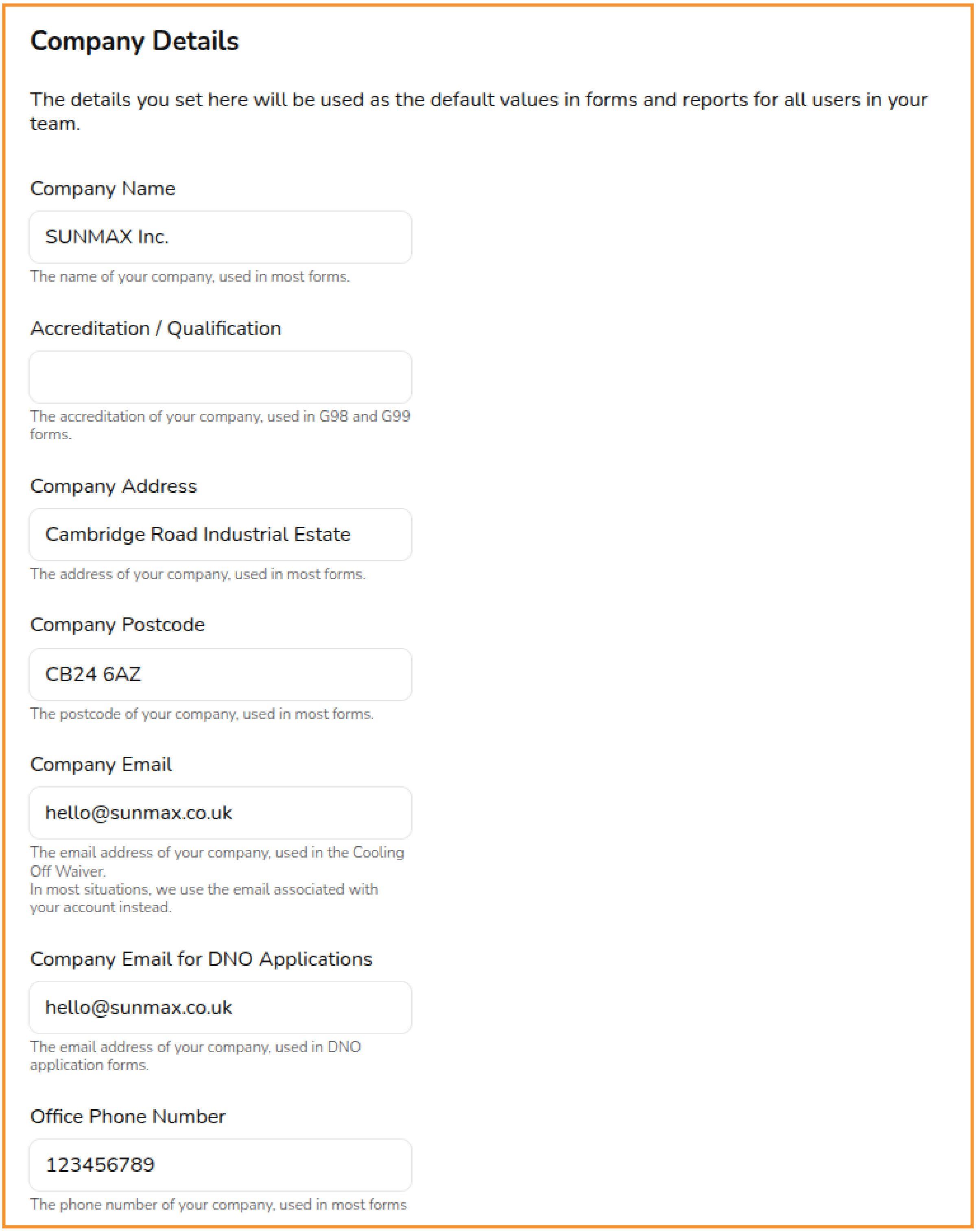


1. General

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.



Company Details

The details you set here will be used as the default values in forms and reports for all users in your team.

Company Name

SUNMAX Inc.

The name of your company, used in most forms.

Accreditation / Qualification

The accreditation of your company, used in G98 and G99 forms.

Company Address

Cambridge Road Industrial Estate

The address of your company, used in most forms.

Company Postcode

CB24 6AZ

The postcode of your company, used in most forms.

Company Email

hello@sunmax.co.uk

The email address of your company, used in the Cooling Off Waiver.
In most situations, we use the email associated with your account instead.

Company Email for DNO Applications

hello@sunmax.co.uk

The email address of your company, used in DNO application forms.

Office Phone Number

123456789

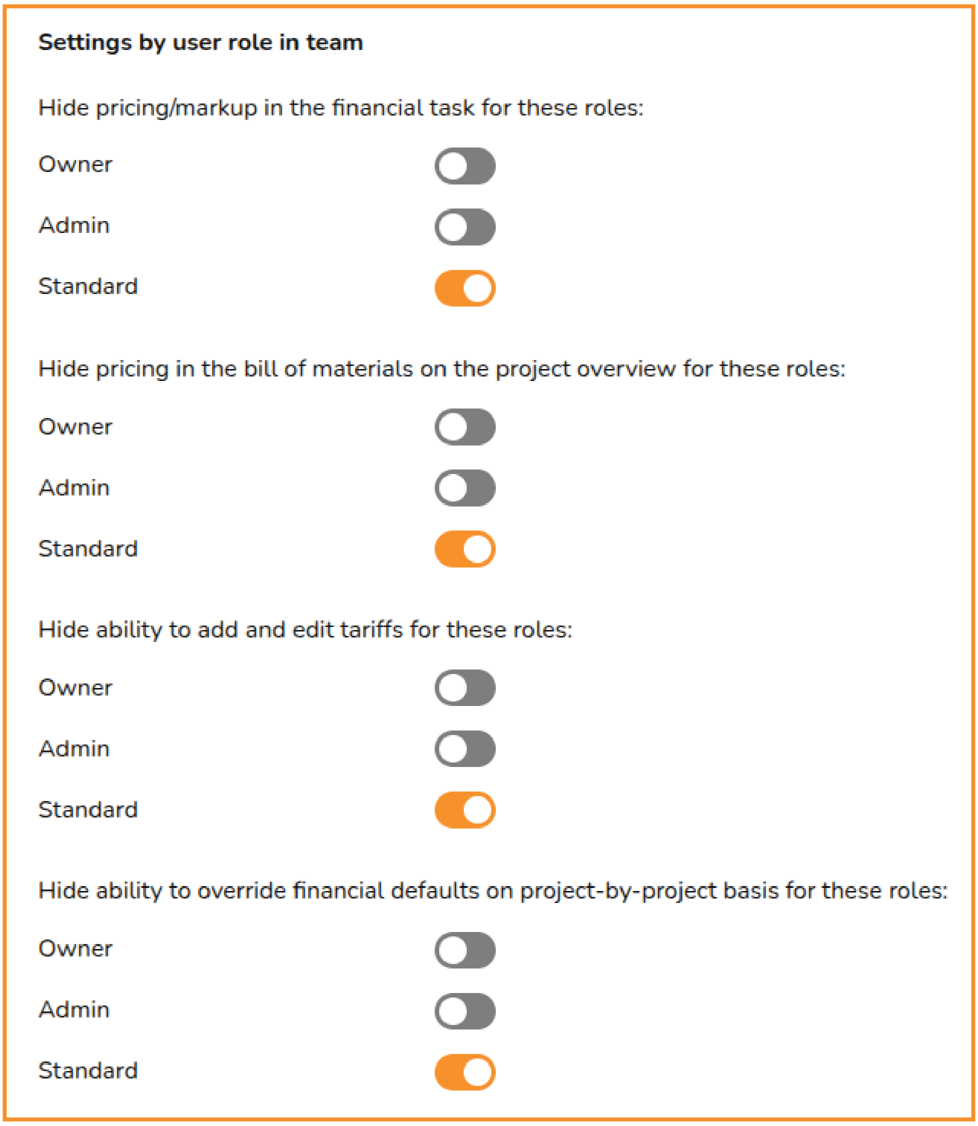
The phone number of your company, used in most forms

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

2. Configuring financial settings

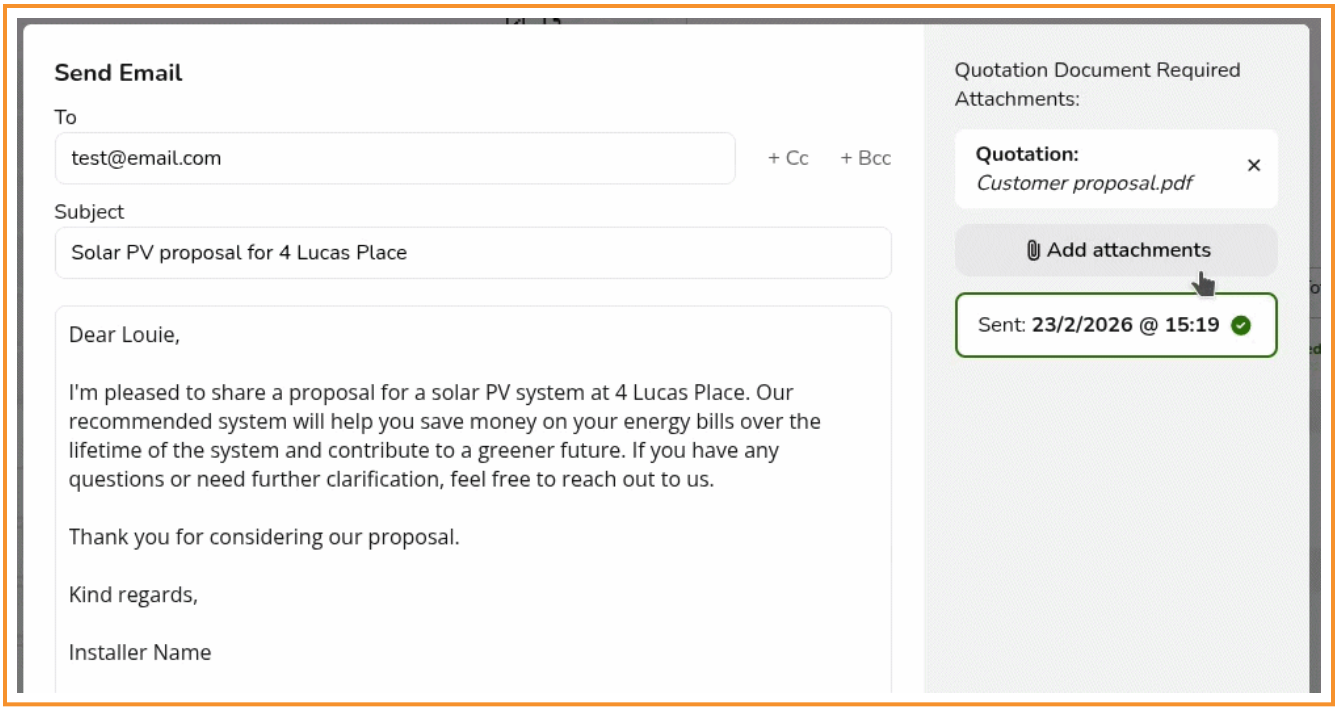
In the **Financial** tab you can configure **financial defaults for your team**. Many of these settings are the same as those available in user settings. Team financial settings override user financial settings and apply consistently across your team's projects. Read about configuring financial settings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

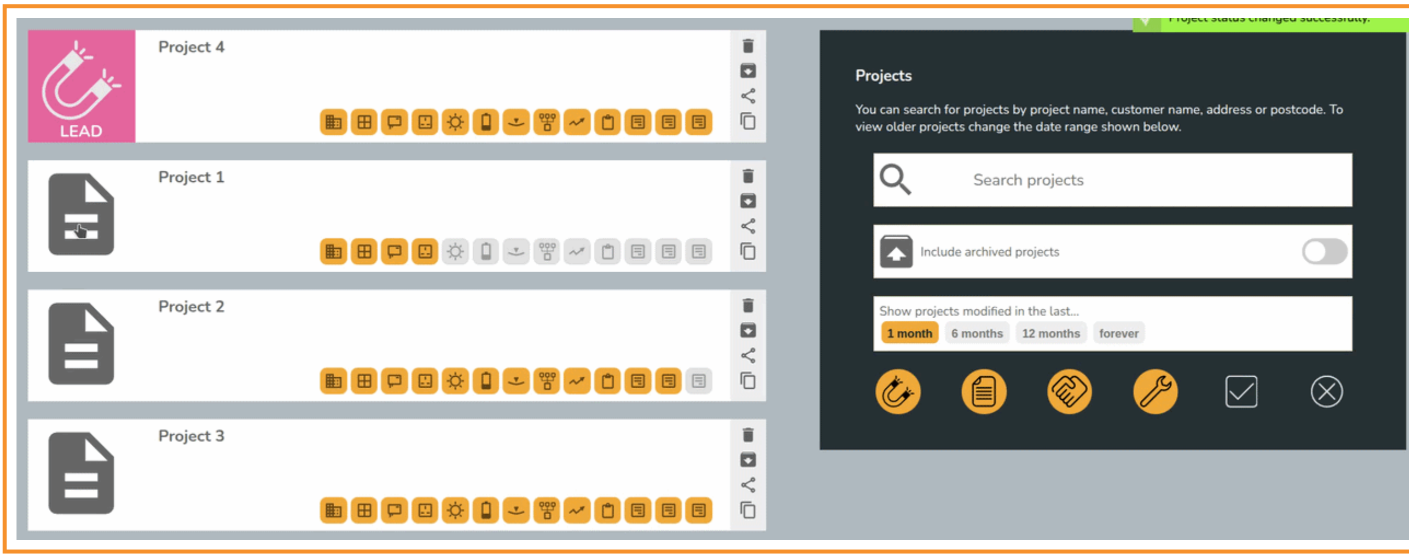
Read more about setting up Speedy PV.

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.

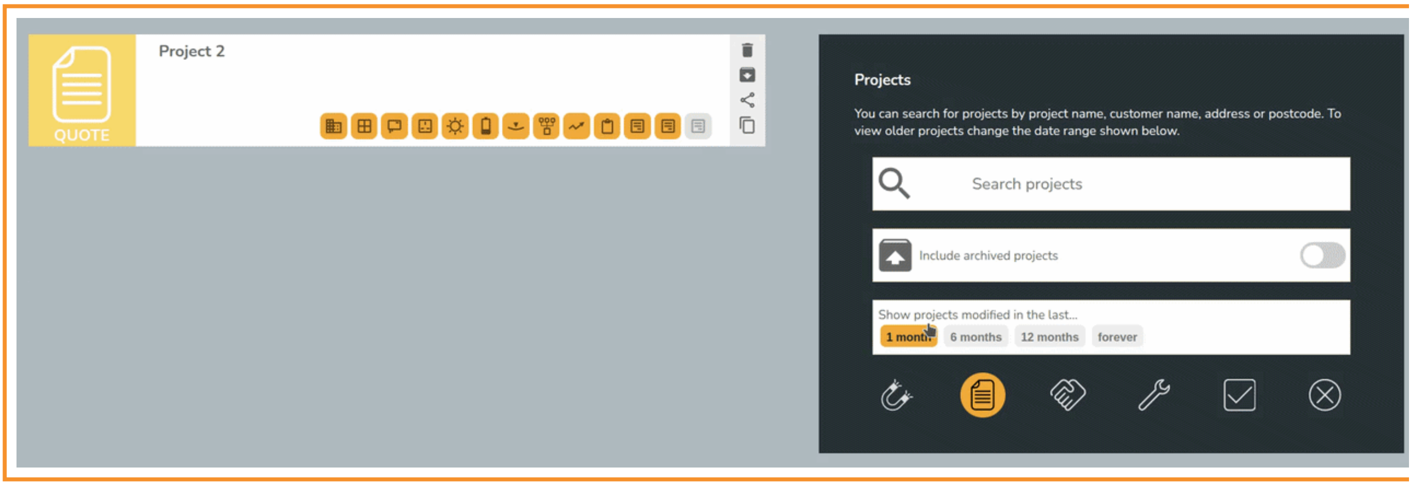
Project statuses

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!

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