

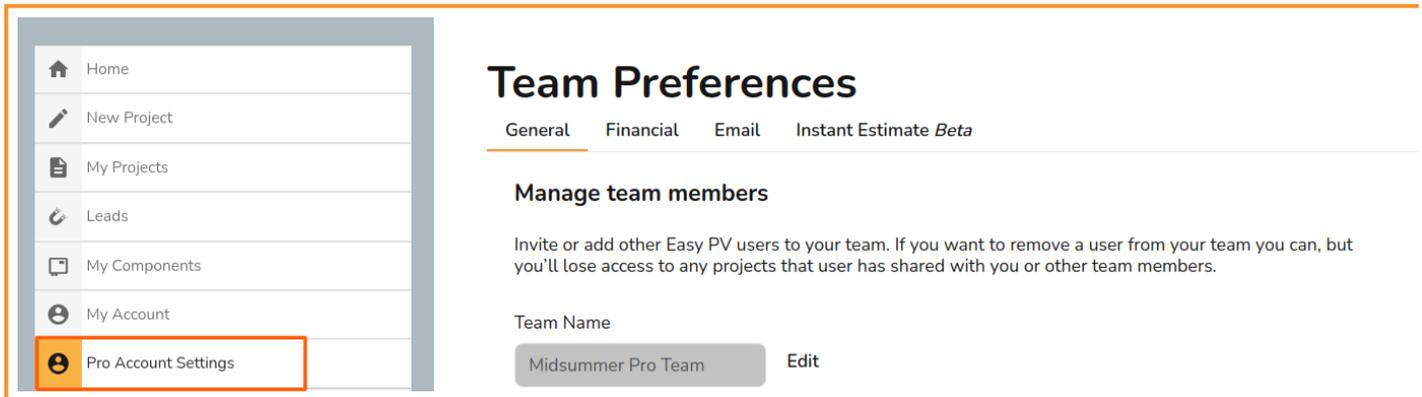
# Pro account settings

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# Pro Team Management and general settings

Team management allows you to have control over who is on your Easy PV Team and the role type they have. The team owner and any users with the **Admin** role type can add and remove users as well as change their role type.

You can manage your team settings in **Pro Account Settings > General**.



The screenshot shows the 'Team Preferences' page. On the left is a navigation menu with items: Home, New Project, My Projects, Leads, My Components, My Account, and Pro Account Settings (highlighted with an orange box). The main content area is titled 'Team Preferences' and has tabs for 'General', 'Financial', 'Email', and 'Instant Estimate Beta'. Under the 'General' tab, there is a section 'Manage team members' with a sub-heading 'Manage team members'. Below this is a paragraph: 'Invite or add other Easy PV users to your team. If you want to remove a user from your team you can, but you'll lose access to any projects that user has shared with you or other team members.' Below the paragraph is a 'Team Name' field containing 'Midsummer Pro Team' and an 'Edit' button.

## Add and remove users

To add users, you'll need the individual's name and email address. You can choose a user's role from the **Role Type** drop-down menu. The **Admin** role includes the ability to view and manage Pro team settings where as a **Standard** user will not have these options.

To remove a user, click on the icon beside the user. 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.

## 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.

## Cancel your subscription

To cancel your subscription, scroll to the bottom of the screen while in **Pro Account Settings**. Then click **Cancel Subscription**. This will cancel your subscription and your team's accounts will switch back to standard access.

# Email Credentials

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

## Team Preferences

General Financial Documents Customer Proposal **Email** Design CRM Connections Speedy PV Beta

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.

## Email configuration

### 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. If you are having trouble please contact support on [help@easy-pv.co.uk](mailto:help@easy-pv.co.uk)

### 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 is dependent on 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
SMTP From Address	<b>Optional:</b> 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	<b>Optional:</b> 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 <b>App Password</b> that you need to set up but in some cases it will be your email password.
SMTP Port	<b>Optional:</b> 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](mailto:help@easy-pv.co.uk), please let us know what provider you are using and a screenshot of the email page with your inputs (do not share your password).