

Pro account settings

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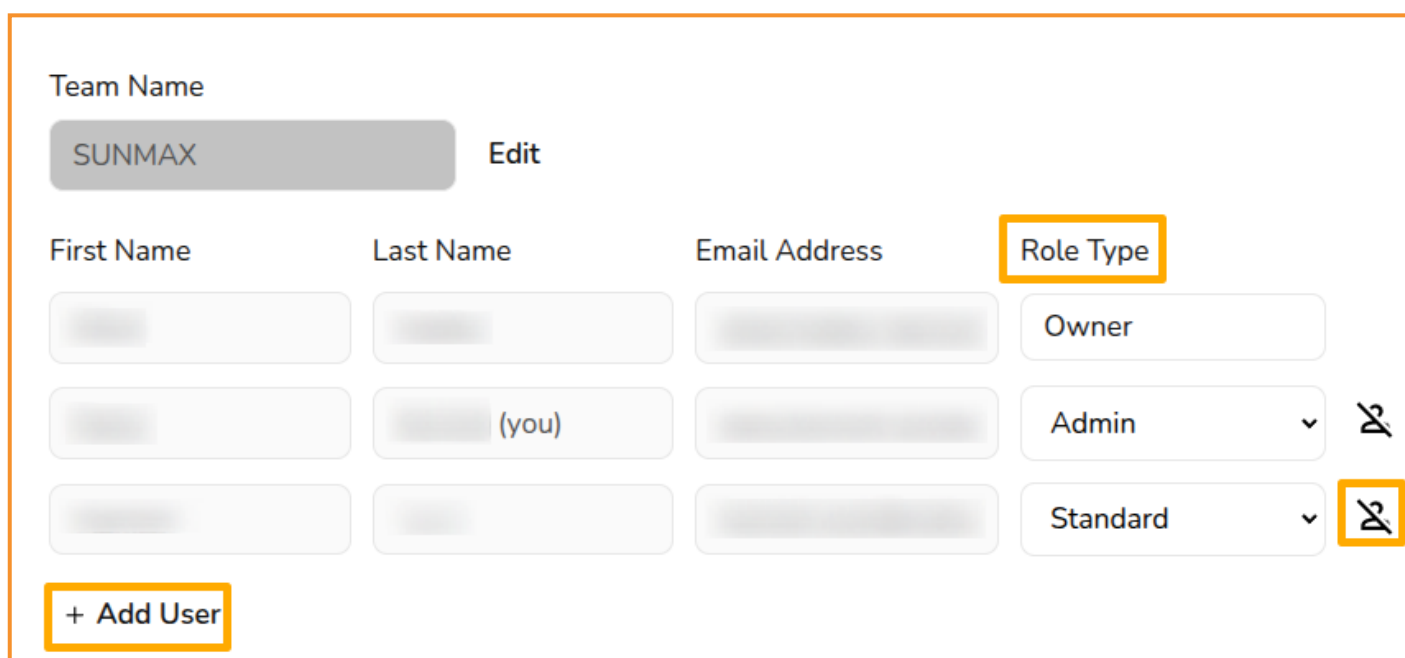
Pro Team Management

This guide applies to easy-pv.ie and easy-pv.co.uk **pro** versions of Easy PV. The information provided here may not be accurate for easy-pv.com.

Pro team management

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 displays the 'Team Name' section with a text input containing 'SUNMAX' and an 'Edit' button. Below this is a table with four columns: 'First Name', 'Last Name', 'Email Address', and 'Role Type'. The 'Role Type' column has a dropdown menu with options 'Owner', 'Admin', and 'Standard'. The 'Admin' and 'Standard' options have a small 'X' icon next to them, indicating they can be removed. At the bottom left, there is a '+ Add User' button.

First Name	Last Name	Email Address	Role Type
			Owner
	(you)		Admin
			Standard

+ Add User

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 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 choose a user's role. This role can be changed at any time.

+ Add User

Standard 



Cancel

Save

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 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.

See here for information on [sharing permissions](#). 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!

Company details and subscription settings

This guide applies to easy-pv.ie and easy-pv.co.uk pro versions of Easy PV. The information provided here may not be accurate for easy-pv.com.

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.

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 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!

Sharing permissions

This guide applies to easy-pv.ie and easy-pv.co.uk **pro** versions of Easy PV. The information provided here may not be accurate for easy-pv.com.

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 projects and components

The sharing permissions for each individual user in the team can be found in **My account** > **Preferences** > **General** and then **Default sharing**. In this section, simply select which permissions you would like to be given automatically when creating a project or component.

Projects

SUNMAX

View Edit Delete Change owner

Components

SUNMAX

View Edit Delete Change owner

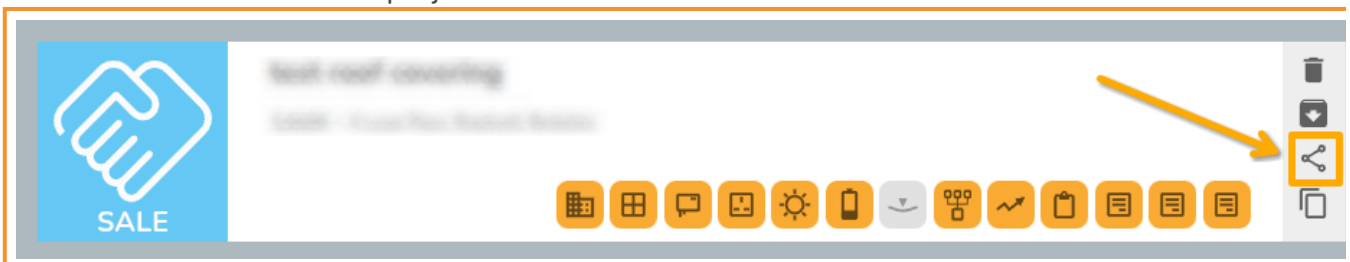
Default sharing

When you create new projects or components you can choose if they should be automatically shared with your colleagues. Click to toggle the rights you want to give the people you can share with.

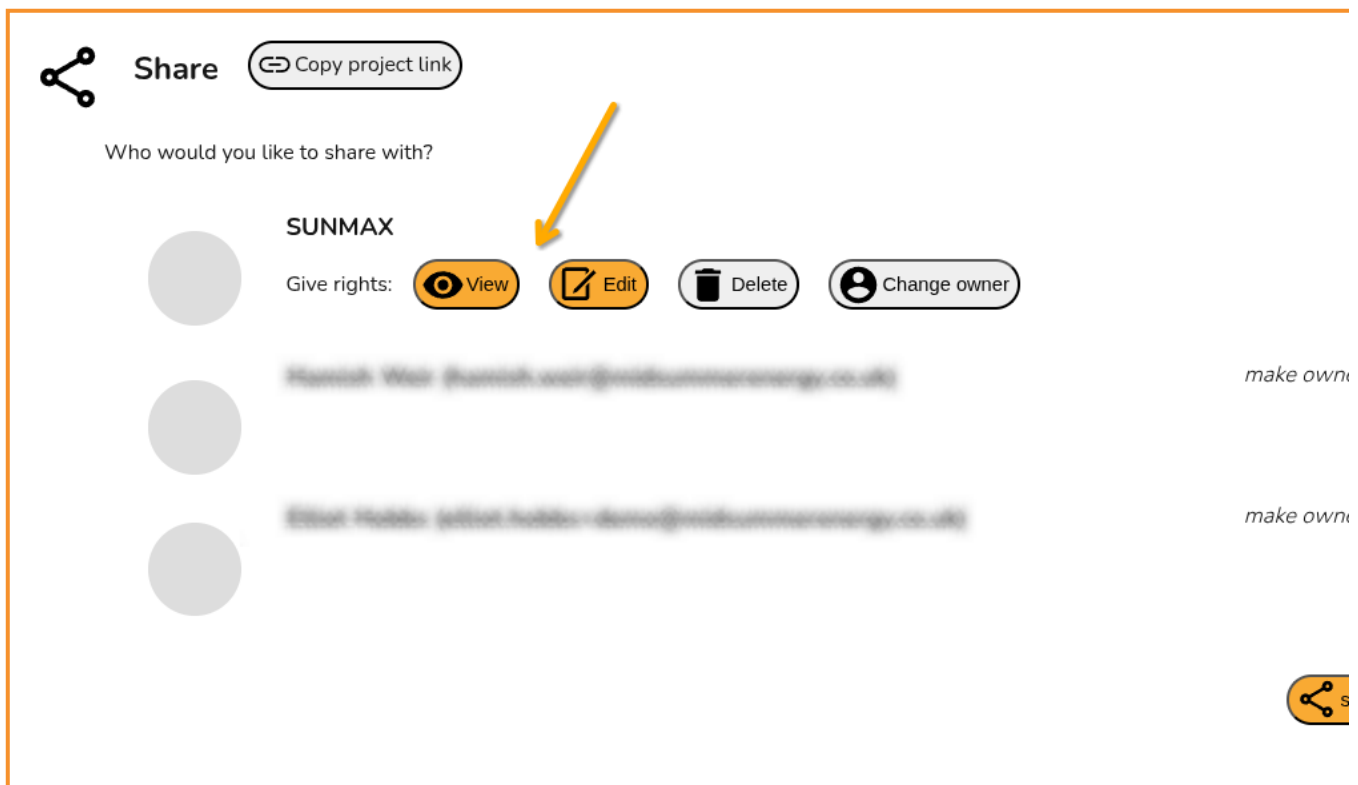
Manually sharing projects

To share an individual project, go to the project list page or the overview of the project:

1. Click the share icon on the project



2. Select which permissions you would like to share




3. 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.

The ability to share will only show on projects owned by you. You'll also see the options to

- **Copy project link:** users who have access to this project will be able to view it from this link.
- **Make owner:** the users displayed here will be the members of your team, clicking *make owner* will transfer ownership to this user. This will mean the project doesn't show on your project list (unless shared with your team) and you will no longer have permissions to choose who the project is shared with.

Manually sharing components

If you are using [custom components](#) in Easy PV, you can share those owned by you with other members of your team. The steps are very similar to above but for custom inverters and solar panels, you need to make sure you share both the manufacturer and the individual component:




Example manufacturer

Not used in any projects

Name:

Description:

Type: PV Invert ▼



Example inverter

Not used in any projects

[+] Add inverter

Viewing projects shared with you

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

Projects

You can search for projects by project name, customer name, address or postcode. To view older projects change the date range shown below.

☐ Include archived projects☒ Show projects shared with you

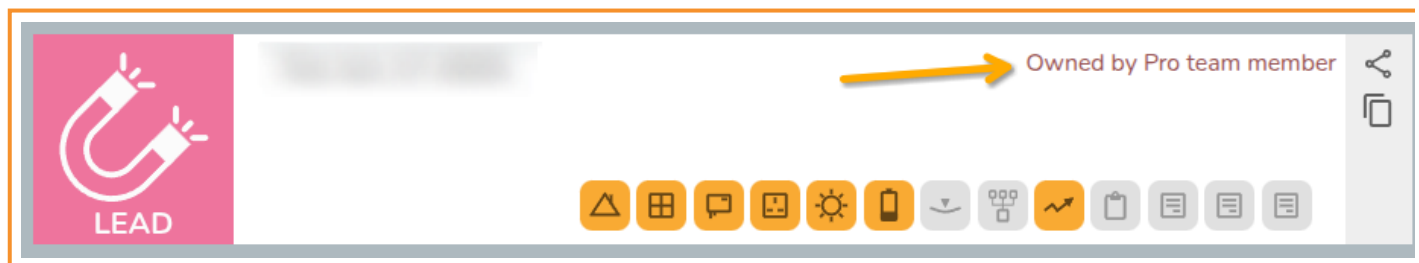
Show projects modified in the last...

1 month 6 months 12 months forever



Page 1 of 2 ▶

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 or would like to share with individual members of your team rather than the whole team, get in touch with our support team on help@easy-pv.co.uk or help@easy-pv.ie!

Email Credentials

This guide applies to easy-pv.ie and easy-pv.co.uk **pro** versions of Easy PV. The information provided here may not be accurate for easy-pv.com.

With Easy PV pro you can send emails to your customer within the software, by setting up your email credentials it means these emails will send from your domain, rather than from [no-reply@easy-pv.co.uk](mailto:reply@easy-pv.co.uk).

Email configuration

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.

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 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	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).

Customer Proposal Customisation

This guide applies to easy-pv.ie and easy-pv.co.uk **pro** versions of Easy PV. The information provided here may not be accurate for easy-pv.com.

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

What can I customise?

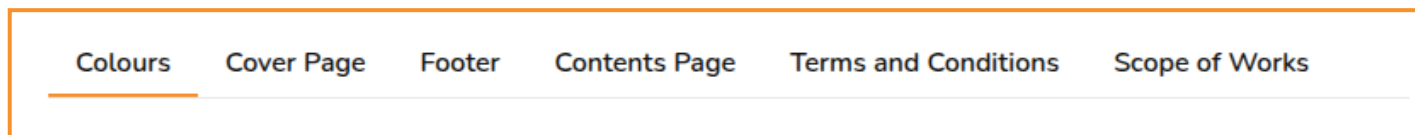
You have the option to:

- 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

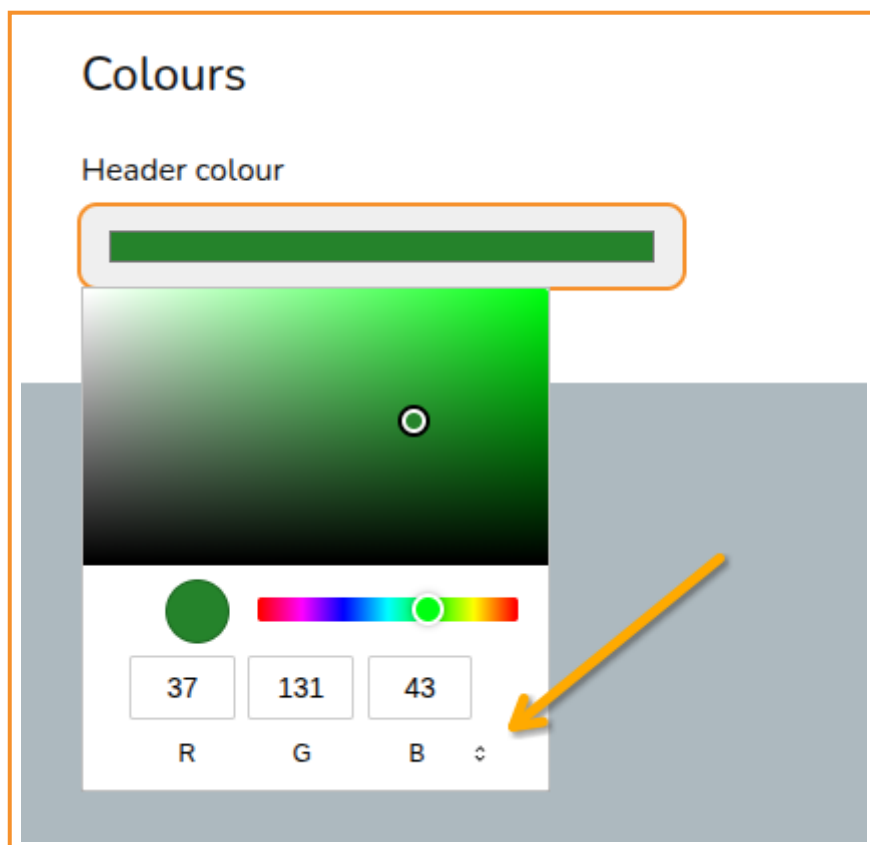
Navigate to **Pro account setting > Proposal**. There will also be an **Uploads** section in your Pro account settings where you can manage all the images you upload.



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

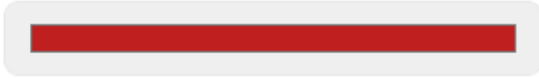
Select whether you would like to include a custom cover page and whether you would like the customer name and address overlaid on your cover page and what colour you'd like this text to

be.

☒ Do you want to include a custom cover page?

☒ Do you want text with the customer name and the address overlaid on the bottom third of the image? You should make sure the text is a strongly contrasting colour to this part of the image.

Proposal page text colour



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 images > 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.

Would you like to upload the cover image or link it by URL?

Select from uploaded image



Upload an image of A4 portrait aspect ratio for the cover page to your team account. Note that if you remove an image, it will no longer be available for viewing in any proposal you have sent out.

Link by URL



Enter a URL for a background image for the cover page, e.g. <https://static.easy-pv.co.uk/graphics/backgrounds/blueswirl.jpg>.

Select from uploaded image

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.

☒ Do you want to include a custom footer?

Phone number

01223 858535

Address

Sunnydale Industrial Park, Suntow...

Website

sunmax.com

Footer text colour

Footer background colour

Select from uploaded image



Upload a logo to your team account. Note that if you delete the logo from your account, it will no longer be available for viewing in any proposal you have sent out.



Link by URL

Enter a URL for a background image for the logo, e.g.
<https://static.easy-pv.co.uk/graphics/uk-flag.png>.



No logo

No logo to be displayed on the footer.

Select from uploaded image

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.



Do you want to use a custom cover letter on the contents page? If not, a default cover letter will be used.

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.

☒ Do you want an 'About Us' section on the contents page?

Do you want a small image for the 'About Us' section?

Select from uploaded image



Upload an image to your team account. Note that if you delete the logo from your account, it will no longer be available for viewing in any proposal you have sent out.

Link by URL



Enter a URL for a background image for the image, e.g.
<https://static.easy-pv.co.uk/graphics/uk-flag.png>.

No image

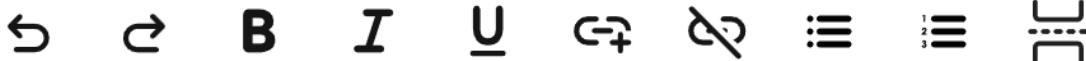


No image to be displayed on the 'About Us' section.

Select from uploaded image

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!