

# Pro features

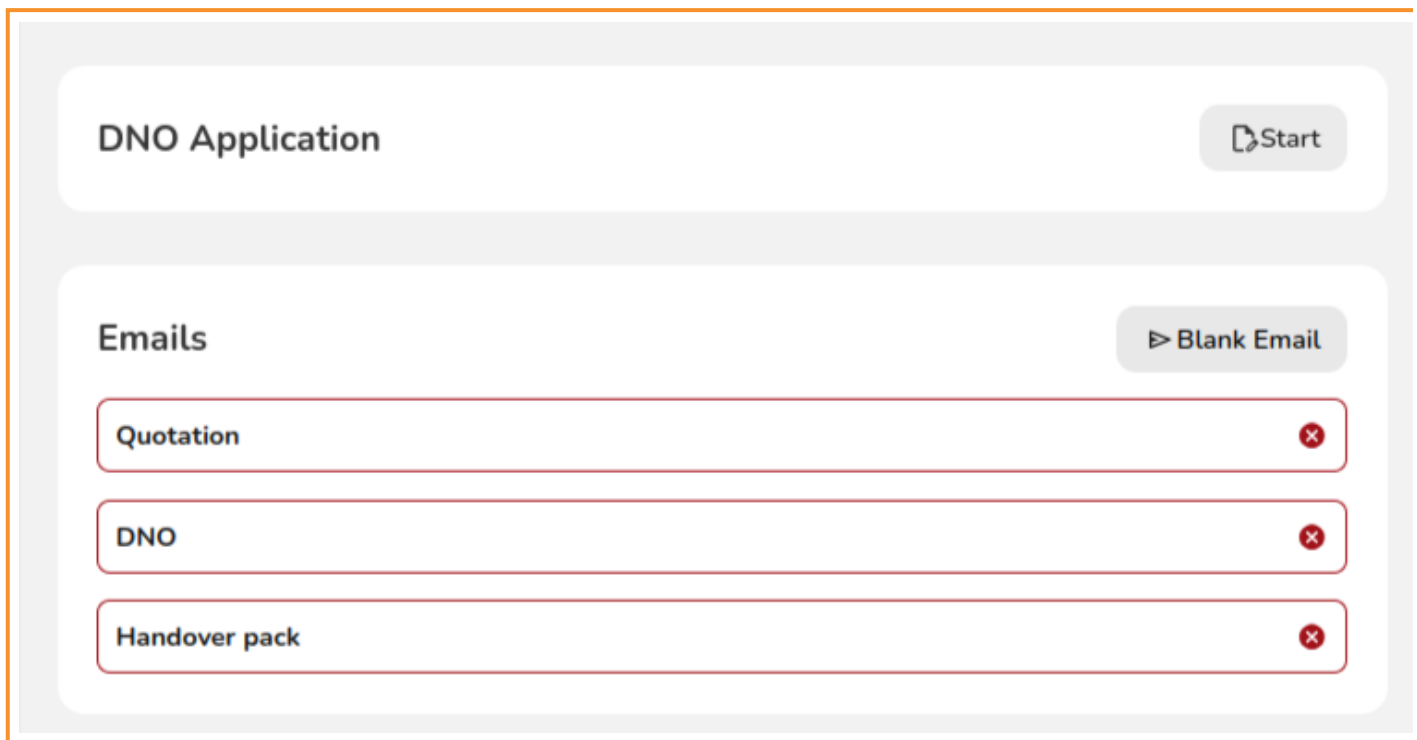
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# DNO Application via Connect Direct

Easy PV Pro's DNO application feature allows you to effortlessly create and submit a DNO application directly based on your Easy PV design. It will take information from your project to pre-populate some of the fields in a specially designed online form.

## Making an Application

It is possible to begin the DNO application form once you have completed the design stage of your project and you have a bill of materials. At the Project Overview screen select **Start** on the DNO Application box on the right-hand side.



The screenshot shows a user interface for creating a DNO application. At the top, there is a header 'DNO Application' and a 'Start' button with a document icon. Below this, there is a section titled 'Emails' with a 'Blank Email' button. Underneath, there are three selectable email templates: 'Quotation', 'DNO', and 'Handover pack'. Each template is enclosed in a rounded rectangle with a red border and a red 'X' icon in the top right corner, indicating they are clickable.

### Further info on form sections

#### MPAN number

Firstly you need to fill in the customer's unique **MPAN number**. This is the 13 digit unique identifier found on the customer's energy bill.

Once this is filled in, Easy PV will add the correct DNO for that address (this can also be set manually). If your DNO is not listed, you can select "Other/IDNO". Connect Direct will use the MPAN to ensure that the application is sent to the correct DNO.

#### Customer info

Your customer's name, address, and contact details along with your own details will be pre-populated here (provided you have entered this data earlier in the design phase). These can also be edited or added here if required.

#### Device information

Easy PV will also have pre-filled the device type and unique reference number for the component that has been used in your design.

**At this point, you need to choose an Installation Date. This date must be in the future**, as only pre-installation applications are supported by Connect Direct.

It is then possible to input details of any devices that may already be installed at the customer's property, for example, an existing AC charger.

#### Supply details

**For the last section 'Supply Details', all of these fields will need to be filled in by you as the user.**

You need to upload a clear image of the 'cut-out' of the electrical supply for the property, something like the image shown [here](#). This image will then be verified and checked so it will need to be accurate

Once all other fields are completed, you can press submit application, which will automatically send the information as a formal application to the designated DNO.

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## Status of the application

You will receive updates from the DNO directly about whether the application has been rejected or approved. You can also view the status of your application from the project overview screen and refresh to check back for updates.

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## Amending an Application

In most circumstances, an application can't be amended. If you make an error in your application, you should submit a new application.

If your application has already been approved by the DNO, and you have not yet submitted commissioning details, it can be amended. You can do this by visiting the project overview, and clicking the Amend Application button:

## DNO Application

[Refresh](#)

**DNO Approved**

30/08/2024, 10:41:17



Resubmit Form

This will return you to the application form, where you can change your answers to any of the questions. Please note that the MPAN, Address and Post Code must all remain the same as the original application. Unlike when making a new application, it is allowed for the installation date to be in the past.

Once you have made your amendments, you can press submit application, and the amendment will be sent to the DNO to be reviewed again. You can track the status of the amendment on the project overview page.

## Sending Commissioning Details

Once the device has been installed on site, you should submit commissioning information to the DNO. You can do this by visiting the project overview, and clicking the 'Send Commissioning Details' button:

## DNO Application

[Refresh](#)

**DNO Approved**

30/08/2024, 10:41:17



Resubmit Form

The information required depends on the the size of the application - Easy PV will automatically determine which form to use, based on the information sent in the original application. Simply answer all questions presented to you, and press "submit details". You can track the progress of your submission from the project overview.


## Adding Attachments

For larger applications, you must provide a circuit diagram for each power generating module. These can be uploaded from the Project Overview page, using the Upload button:


# Documents

↑ Upload


## Reports ?




PV Array Test Report




G99 50KW - DNO...




Survey



Scaffolding request



Installation record



See All

Alternatively, the Schematic tool in Easy PV will automatically generate a circuit diagram based on your design. Make any necessary adjustments to the diagram, and press the PDF button in the schematic task to generate a PDF that can be saved to the project.

Once you have uploaded or saved a file to your project, you should be able to select it from the drop-down, and complete your submission.

### Additional Attachments

Attachment 1

🗑

File

Fri Aug 30 2024 Schematic~Schematic.pdf

Add attachment

# Document Management

The document management section can be found at the bottom of the project overview. It allows you to keep track of all the documents you need for a project in one place. When a document is shown in red, it means it has not been saved/uploaded to the file management section of your project yet.

The screenshot displays a software interface for document management. On the left, a sidebar contains a 'Lead' dropdown, a date 'Mon Jun 17 2024', an address '61 High Street Cambridge Cambridgeshire CB22 6RP', and several 'Add details' buttons. Below this is a list of project components: Roof, Panels, Inverter, Electrical, Performance, Consumption, Structural, Schematic, Financial, Surveys, Customer Proposal, and Installation record. A 'MIDSUMMER' banner at the bottom left promotes 'Solar panels, Heat pumps, and more!'. The main area is divided into three sections. The top section, 'Incomplete Forms', lists various documents like 'PV Array Test Report' and 'G99 50KW - DNO Application Form', each with a checkmark icon. The bottom section, 'Documents', is highlighted with a red border and contains an 'Upload' button and a list of 'Uploaded Documents' including a PDF file named 'growatt-warranty...'. Below the uploaded documents is a 'Reports' section with icons for 'PV Array Test Report', 'PV Array Test Report V2', 'G99 50KW - DNO...', 'Customer Proposal', 'Survey', and a 'See All' button. The right sidebar shows a 'DNO Application' section with a 'Total (ex VAT)' field and a note about a 'Midsummer account' being 'unlinked'. Below this is an 'Emails' section with buttons for 'Quotation', 'DNO', and 'Handover pack'.

## Saving an Easy PV report to the document manager

Let's use the quote as an example of how to save a document to the document management section. When previewing the customer proposal report, you will see a **menu on the right-hand side with a save button at the bottom**. After clicking the save button, you can go back to the Project Overview and see that the quote has been saved to the document section.

Cover page

You don't have a 'cover' page. Enquire about our Enterprise packages, which allow you to customise this quote document and access e-signing of documents, a survey task and project management features.

YOUR  
SOLAR  
QUOTE

Hi Rich.

Thanks for choosing us to provide a design for a solar PV system at The road, CA12 5QB.

We're delighted to supply the attached proposal for a 4.675 kW solar array.

We expect your system to generate 4,068 kWh of clean electricity every year, and save 864 kg CO<sub>2</sub> of carbon.

There are full details on the following pages. We hope you enjoy the read!

Kind regards,

Matthew Agnes

Midsummer Installations

← Project Overview

Customer Proposal

Customer proposal

Include Sections:

Cover

Introduction

About

Overview

Performance

Battery Storage

Consumption

Financial

Environment

Quote

0/1 Customer Signatures

Save

## Upload a document from your device

To upload a document from your device, **click the Upload button**. Then drag and drop the file, or use the **Upload File** button to find the document you wish to upload.

Documents

Uploaded Documents

Upload

Rename

Reassign

Download

Delete

PV Array Test Report

PV Array Test Report V2

G99 50KW - DNO...

Customer Proposal

Survey

See All

## View, rename, download, or delete files you've saved to your project ▢

1. If you'd like to download any of the files you've added to your project, click the **Download** button.
2. You can change the name of a file by clicking the three dots and choosing **Rename**.
3. To categorise your saved files, click the three dots and select **Reassign**.
4. To delete a document, click the three dots and then **Delete**. This will delete the saved version of the document from the file management section of your project.

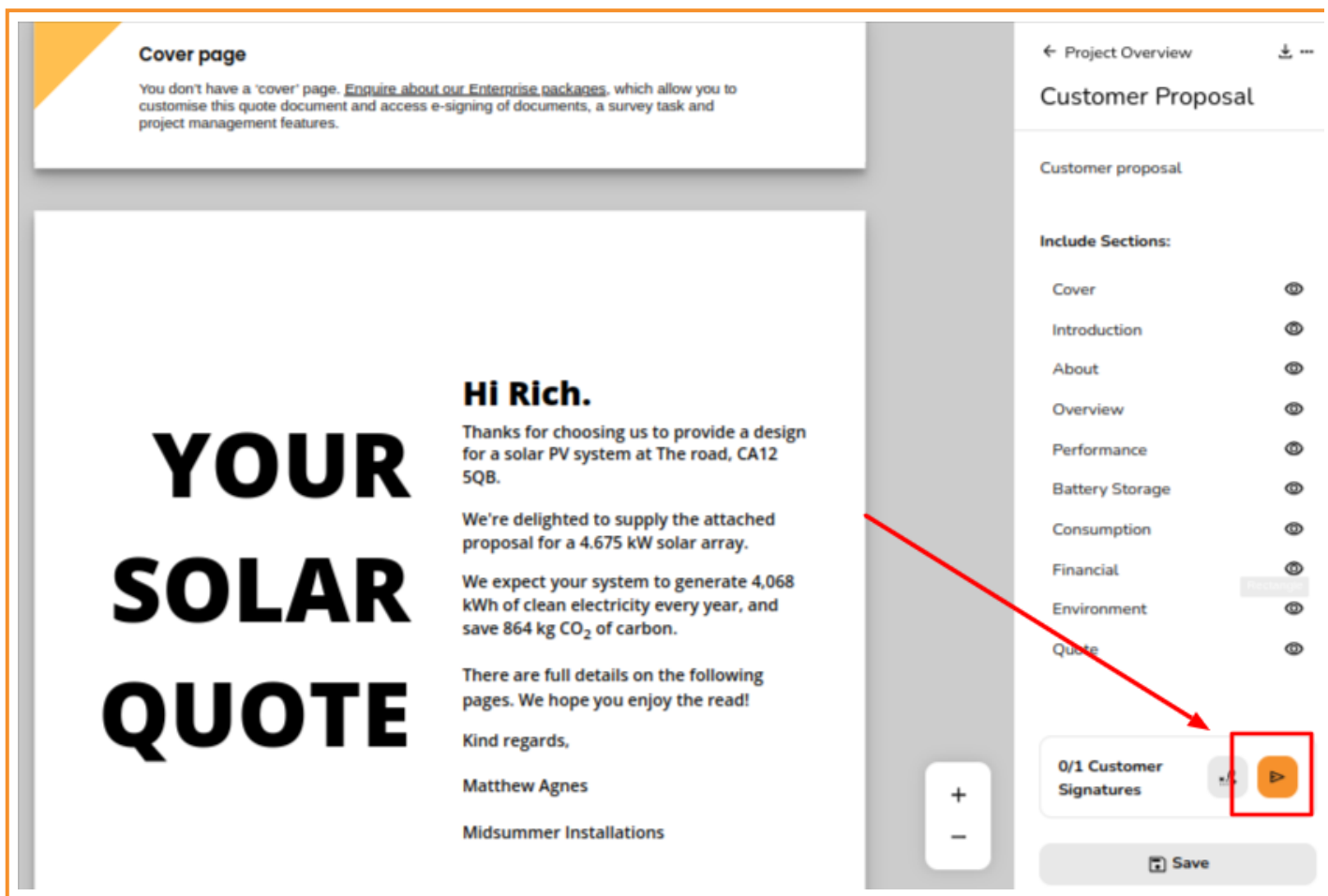


# E-signing

The e-signing functionality makes it quick and easy to get important documents signed by your team or customer. Several reports have e-signing capabilities including the customer proposal, G98, G99 A1-1, G99 A1-2, and PV Array Test.

## Send a document for e-signing by email

Navigate to the report you want to send for signing via the Reports drop-down in the main site navigation. **Click the send for signing button** outlined in red in the screenshot above. This will open the send-for-signing modal. You can edit the email as you'd like and then **click Send**. The recipient will receive the email which will include a link for them to review and sign the document.



## Signing a document

When viewing a document that requires e-signing, the customer (or your team members) can **click the signature field** and then enter their name, the date, and their signature. They must tick the box to indicate they agree to the contents of the document.

After the document is signed after being sent via email, the recipient will receive an email with the signed document attached and you will receive an email confirming that the recipient has signed the document.

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## View a signed document

To view the signed version of the document, **navigate to the document via the reports dropdown** in the main navigation. The signed version of the document can be loaded by selecting the date version you want to view.

# Emailing

You can access the email management section via the project overview. Here you can keep track of emails that have been sent.

Lead

Mon Jun 17 2024

61 High Street Cambridge Cambridgeshire CB22 6RP

Add details

Add details

Add details

Roof

Panels

Inverter

Electrical

Performance

Consumption

Structural

Schematic

Financial

Surveys

Customer Proposal

Installation record

MIDSUMMER

Forms

Complete Forms

Scaffolding Request

DNO application via Connect Direct

Incomplete Forms

PV Array Test Report

PV Array Test Report V2

G99 50KW - DNO Application Form

Letter of Consent

G98

G99 A1-1 - DNO Application Form

G99 A1-2 - DNO Application Form

G99 A3-1 - Installation Document

G99 A3-2 - Installation Document

G99 A3-3 - Installation Document

Documents

Upload

1 Unknown electrical accessory (3515) Not a stock item

2 AC isolator - IMO - 40A 4-pole £36.40 £72.80

4 MC4 4mm Connector Pair £3.00 £12.00

1 50m reel of 4mm2 solar cable £42.00 £42.00

40 Fastensol black universal clamp £1.54 £61.60

20 Fastensol black end cap £0.63 £12.60

40 Fastensol landscape slate roof hook £5.18 £207.20

10 Fastensol silver rail 3550mm £25.20 £252.00

Total (ex VAT and delivery) £3340.56

Midsummer account unlinked - Connect account for more accurate pricing

DNO Application

Continue

Emails

Blank Email

Quotation

DNO

Handover pack

If you would like emails to send from your email and domain, rather than no-reply@easy-pv.co.uk, then follow the steps outlined [here](#).

## Editing and sending an email

**Send Email**

To

+ Bcc

Cc

leo.kelly+pro@midsummerenergy.co.uk

Subject

Solar PV proposal for 61 High Street Cambridge Cambridgeshire

Dear customer,

I'm pleased to share a proposal for a solar PV system at 61 High Street Cambridge Cambridgeshire. Our recommended system will help you save money on your energy bills over the lifetime of the system and contribute to a greener future. If you have any questions or need further clarification, feel free to reach out to us.

Thank you for considering our proposal.

Kind regards,

ProLeo Kelly  
Midsummer Installations

Quotation Document Required Attachments:

Quotation: *Quotation incomplete* →

Add attachments

Cancel Send

Using the Quotation email as an example, when you click on the **Quotation** email option it will open an email window, like the one shown above. The customer's email address will automatically be filled (if it has been added to the project). Your email will populate in the 'Cc' field.

The quotation will be automatically attached to the email if it was saved to the file management section. You can add other attachments and then click **Send** when you are ready to send.

## Adding additional attachments

You can add additional files to the email by clicking **Add attachments**. Please note you will only be able to upload files you previously uploaded/saved to the file management section or component management section.

**Important:** Please note that if you send the quote to the customer via this method, it will be sent as a PDF attachment. Follow the instructions [here](#) to send documents for e-signing.

# Survey and installation record tasks

The survey task allows the surveyor to enter all information required to plan out the installation in one location. Surveyors can answer the questions and add additional comments. Information is pulled through from the survey to a scaffolding request form which you can also access from the **Forms** drop-down.

The installation record works in many of the same ways as the survey task, it instead allows you to keep a good record of your install should any issues arise in the future.

In both forms you can upload images and apply image annotations. A PDF report of the survey and installation record can be generated from the reports drop-down in the main navigation.

## Accessing the survey and installation record

From any project, click the **Tasks** option in the main navigation menu, then select **Surveys** or **Installation record**.

### Filling out

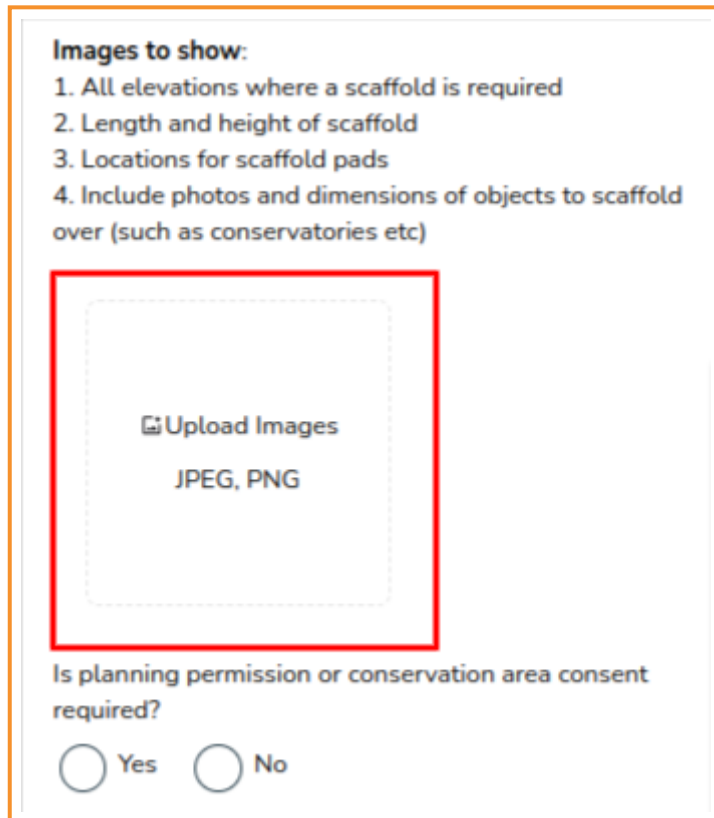
Both forms are divided into sections that can be viewed and navigated between using the right-hand menu.

Solar Survey	Installation record
<ul style="list-style-type: none"><li>← Project Overview</li><li>Solar Survey</li><li>Access and safety</li><li>Roofs</li><li>Loft access</li><li>Existing electrics</li><li>PV inverter</li><li>Battery system</li><li>Communication cables and connectivity</li><li>Consumption</li><li>Additional comments and images</li></ul>	<ul style="list-style-type: none"><li>← Project Overview</li><li>↻ Installation record</li><li>Roofs</li><li>Inverters</li><li>Electrical</li><li>Monitoring system</li><li>Further information</li></ul>

### Uploading an image

There are various places throughout the survey and installation record where pictures can be uploaded and annotated. Click on the **Upload Images** box and it will bring up the option to upload

a picture from your files. If you are on a mobile or tablet device it will give you the option to take a photo. You can repeat this step to add multiple images.



**Images to show:**

1. All elevations where a scaffold is required
2. Length and height of scaffold
3. Locations for scaffold pads
4. Include photos and dimensions of objects to scaffold over (such as conservatories etc)

Upload Images  
JPEG, PNG

Is planning permission or conservation area consent required?

☐ Yes ☐ No

Note that .heic files (usually from mobile devices) are not supported at this time. If your phone, tablet, or camera is set to save pictures in this file format, please change this to save .jpg files in settings.

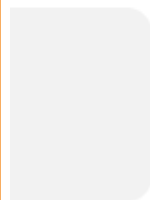
## Adding annotations to your images

Once the file has been uploaded, you can **click on the picture to bring up the annotation options**.

- Use the bin button to delete annotations or the whole image.
- The cursor lets you select annotations you have added to the image.
- The pencil allows you to draw or write free-form.
- The 'T' is used to create a text box.
- The arrow lets you draw an arrow.
- The colour box is where you can change the colour of annotations.
- The tick mark saves your annotations and exits the annotations editor.

## Accessing your survey and installation record as a PDF report

After the form is complete, the report can be found in the **Reports** drop-down.



Phy Survey Test Report

QDR-1000 - QDR Application Form

Survey

Qualifying report

Installation record

Letter of Consent

Cooling off Notice

Customer Proposal

QDR

QDR-A1-1 - QDR Application Form

QDR-A1-2 - QDR Application Form

QDR-A1-3 - Installation Document

QDR-A1-4 - Installation Document

QDR-A1-5 - Installation Document

QDR-A1-6 - QDR Application Form

QDR-A1-7 - QDR Application Form

Easy Phy Project Report

Schedule

Performance Report

QDR Consent Sheet

Form

Comp



QDR