

# Pro: Videos and guides

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# Pro account settings

# Pro Team Management

This guide applies to [easy-pv.ie](https://easy-pv.ie) and [easy-pv.co.uk](https://easy-pv.co.uk) [pro](#) versions of Easy PV. The information provided here may not be accurate for [easy-pv.com](https://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**.

Team Name

SUNMAX

Edit

First Name	Last Name	Email Address	Role Type	
<input type="text"/>	<input type="text"/>	<input type="text"/>	Owner	
<input type="text"/>	<input type="text" value="(you)"/>	<input type="text"/>	Admin	<div>▼</div>
<input type="text"/>	<input type="text"/>	<input type="text"/>	Standard	<div>▼</div>

+ 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 

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.

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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](mailto:help@easy-pv.co.uk) or [help@easy-pv.ie](mailto:help@easy-pv.ie)!

# Company details and subscription settings

This guide applies to [easy-pv.ie](https://easy-pv.ie) and [easy-pv.co.uk](https://easy-pv.co.uk) pro versions of Easy PV. The information provided here may not be accurate for [easy-pv.com](https://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](mailto:help@easy-pv.co.uk) or [help@easy-pv.ie](mailto:help@easy-pv.ie)!

# Sharing permissions

This guide applies to [easy-pv.ie](https://easy-pv.ie) and [easy-pv.co.uk](https://easy-pv.co.uk) pro versions of Easy PV. The information provided here may not be accurate for [easy-pv.com](https://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

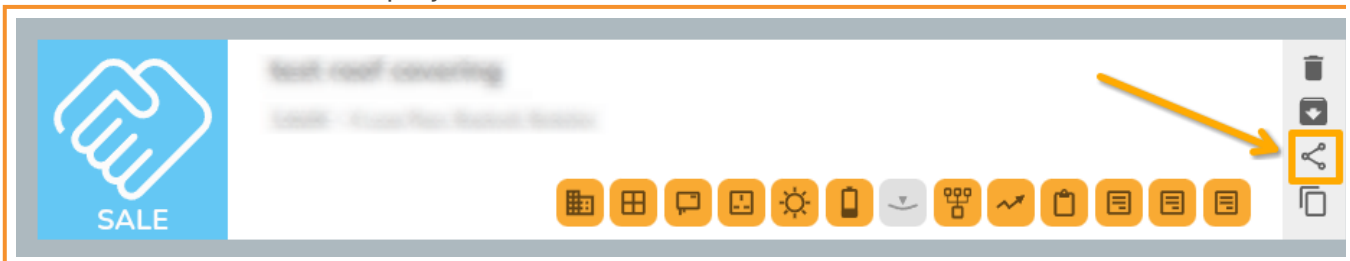
### Default sharing

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.

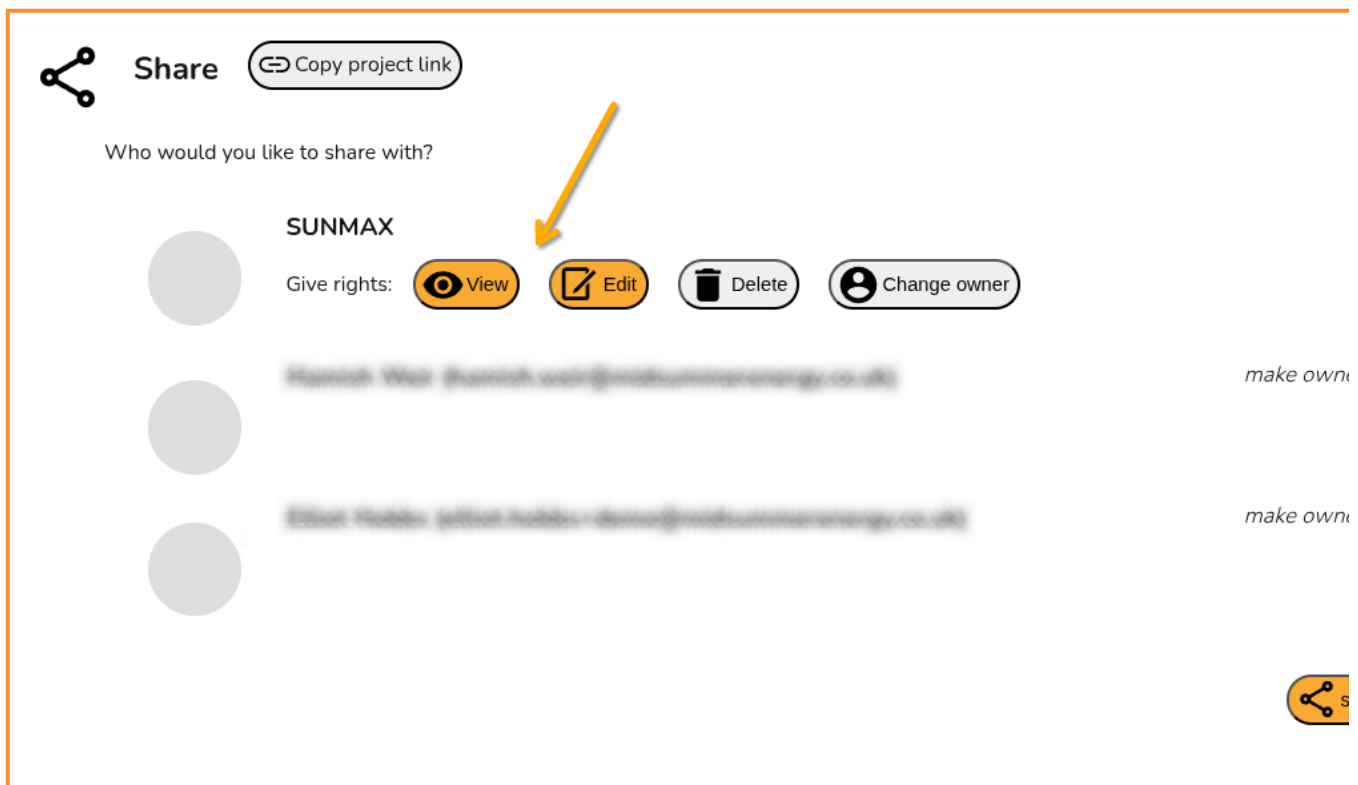
## Manually sharing projects

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 ☒

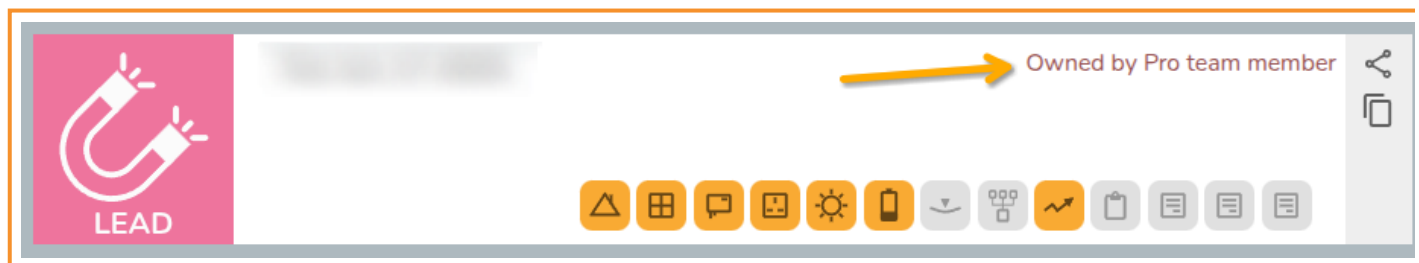
Show projects modified in the last...  

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](mailto:help@easy-pv.co.uk) or [help@easy-pv.ie](mailto:help@easy-pv.ie)!

# Email Credentials

This guide applies to [easy-pv.ie](https://easy-pv.ie) and [easy-pv.co.uk](https://easy-pv.co.uk) pro versions of Easy PV. The information provided here may not be accurate for [easy-pv.com](https://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	<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.

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If you are having trouble, please contact support on [help@easy-pv.co.uk](mailto:help@easy-pv.co.uk) or [help@easy-pv.ie](mailto: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](https://easy-pv.ie) and [easy-pv.co.uk](https://easy-pv.co.uk) pro versions of Easy PV. The information provided here may not be accurate for [easy-pv.com](https://easy-pv.com).

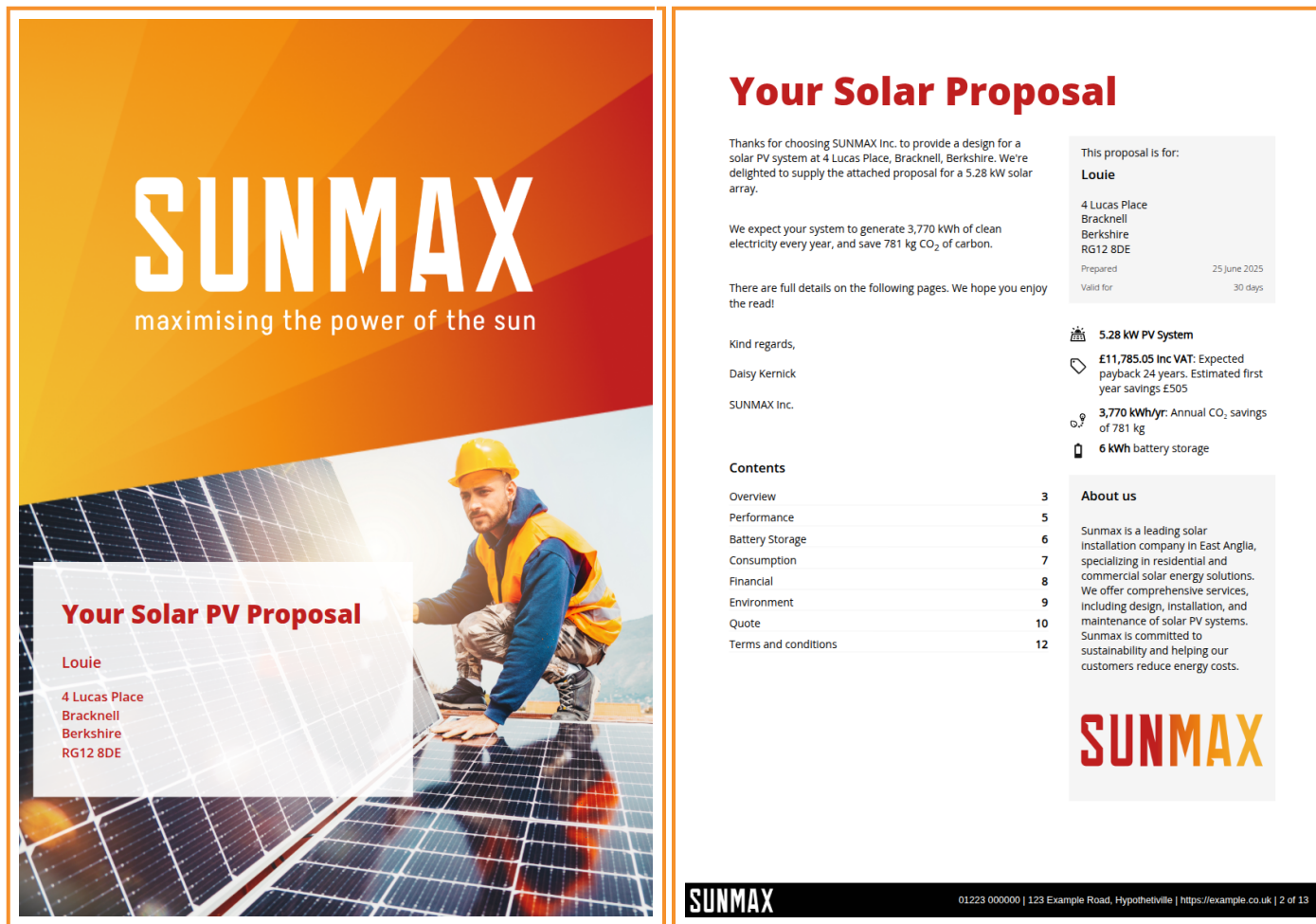
With Easy PV Pro, you are able to customise the proposal document that you send to your customers. This can help you align the proposal more with your branding and help you stand out!

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## 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](mailto:help@easy-pv.co.uk) or [help@easy-pv.ie](mailto:help@easy-pv.ie).

## Setting up

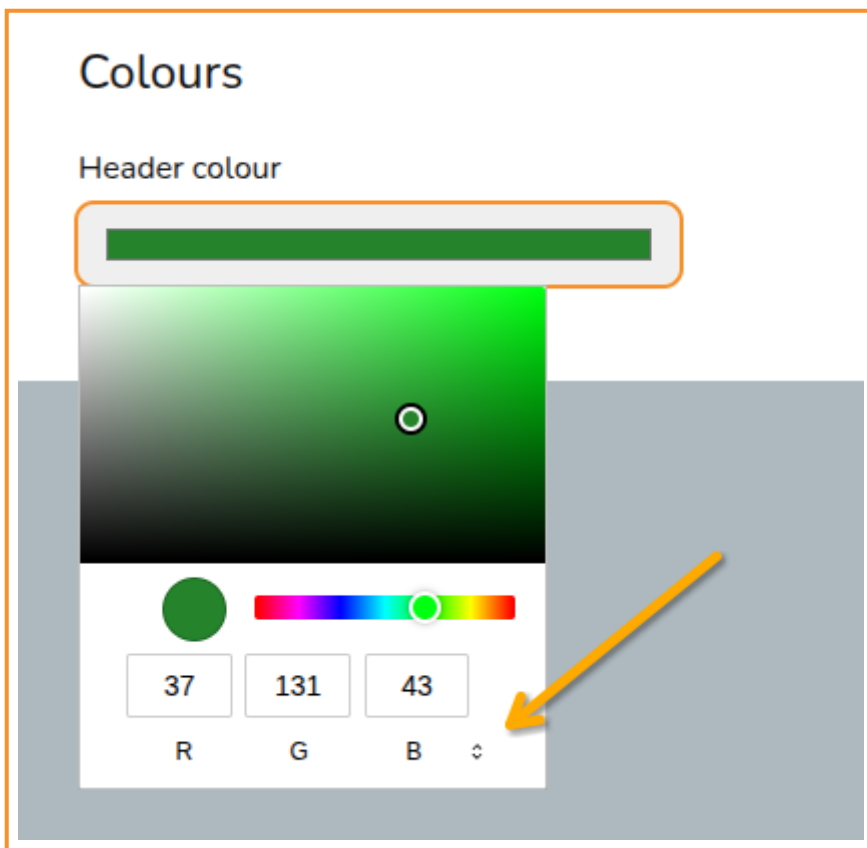
Navigate to **Pro account setting > Proposal**. There will also be an **Uploads** section in your Pro account settings where you can manage all the images you upload.

Colours   Cover Page   Footer   Contents Page   Terms and Conditions   Scope of Works

## 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.

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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](mailto:help@easy-pv.co.uk) or [help@easy-pv.ie](mailto:help@easy-pv.ie)!

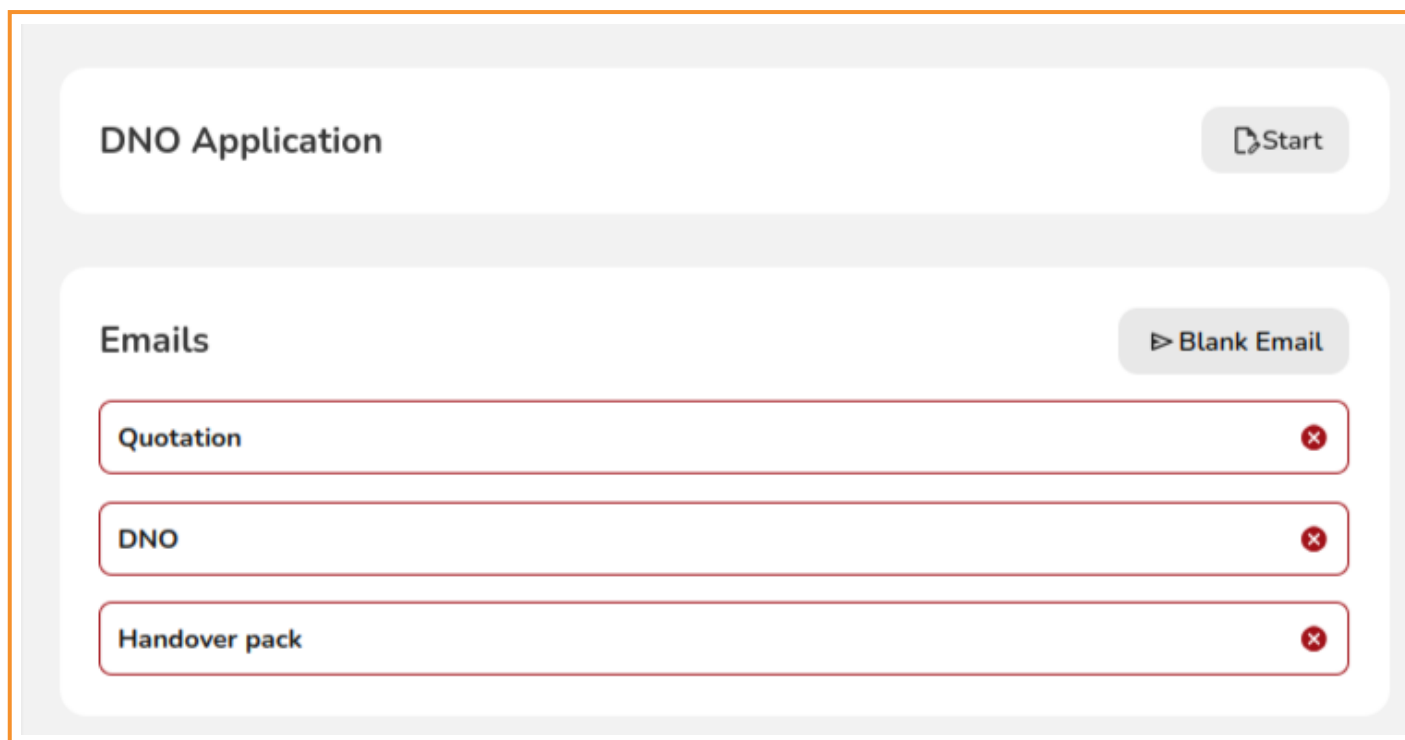
# Pro features

# 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 web interface for the 'DNO Application' process. At the top, there is a header bar with the title 'DNO Application' on the left and a 'Start' button with a right-pointing arrow on the right. Below this, there is a section titled 'Emails' on the left and a 'Blank Email' button with a right-pointing arrow on the right. Under the 'Emails' section, there are three input fields, each with a red 'x' icon on the right side: 'Quotation', 'DNO', and 'Handover pack'.

### 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.

---

## 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



**DNO Approved**

30/08/2024, 10:41:17

 Refresh



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



**DNO Approved**

30/08/2024, 10:41:17

 Refresh



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 the Midsummer project overview interface. On the left, a sidebar contains a 'Lead' dropdown, the date 'Mon Jun 17 2024', the address '61 High Street Cambridge Cambridgeshire CB22 6RP', and a list of 'Add details' buttons. Below this is a vertical menu with icons for Roof, Panels, Inverter, Electrical, Performance, Consumption, Structural, Schematic, Financial, Surveys, Customer Proposal, and Installation record. At the bottom of the sidebar is a 'MIDSUMMER' banner for 'Solar panels, Heat pumps, and more!'. The main content area is divided into three sections. The top section, 'Incomplete Forms', lists various documents with checkboxes for completion, including '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', and 'G99 A3-3 - Installation Document'. The middle section, 'Documents', is highlighted with a red border and contains an 'Upload' button and a list of 'Uploaded Documents' with a PDF icon and the text 'growatt-warranty...'. The bottom section, 'Reports', shows icons for 'PV Array Test Report', 'PV Array Test Report V2', 'G99 50KW - DNO...', 'Customer Proposal', 'Survey', and a 'See All' button. On the right side of the interface, there is a 'DNO Application' section with a 'Quotation' button, a 'DNO' button, and a 'Handover pack' button. Below these is a 'Midsummer account unlinked - Connect account for more accuracy' message.

## 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

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▯

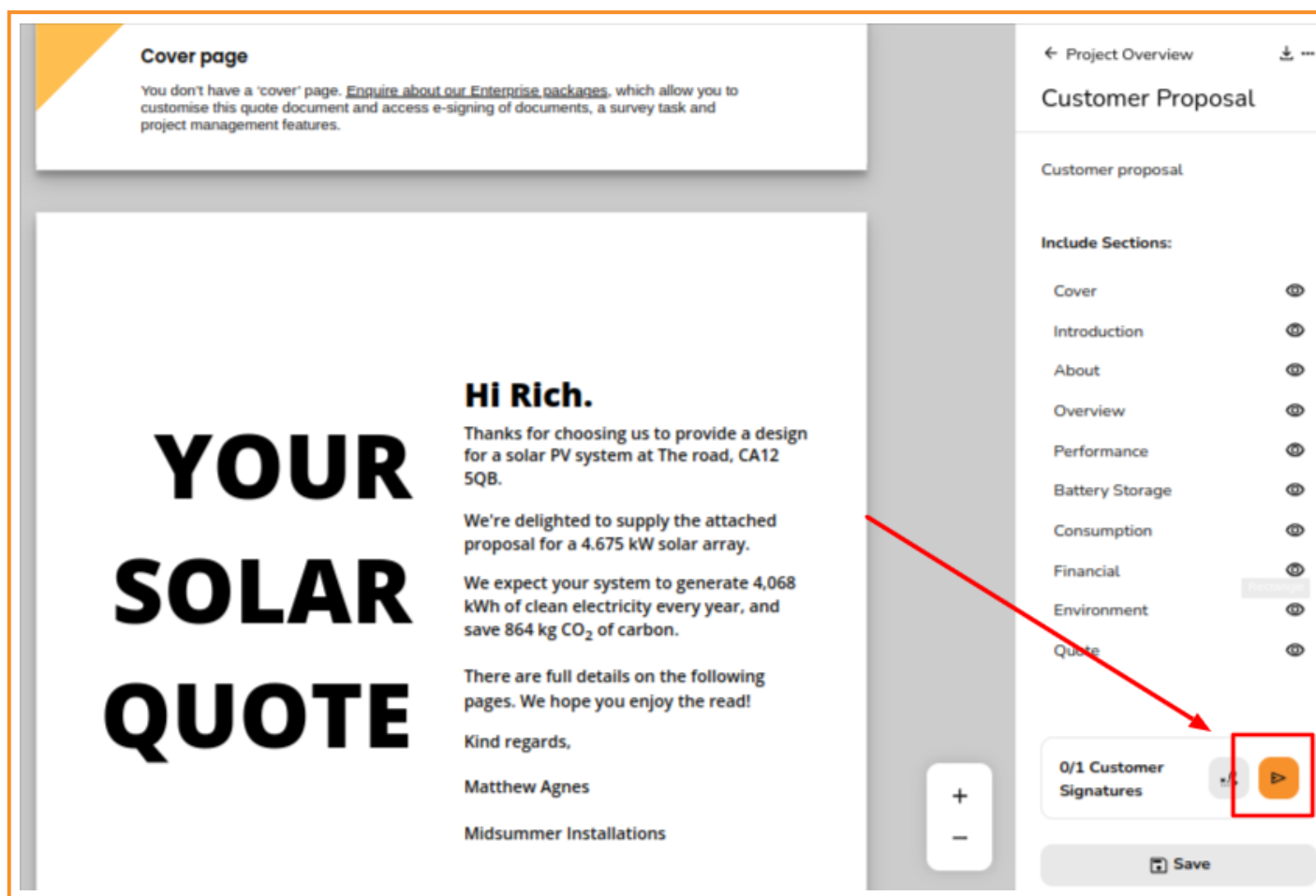
1. If you'd like to download any of the files you've added to your project, click the **Download** button.
2. You can change the name of a file by clicking the three dots and choosing **Rename**.
3. To categorise your saved files, click the three dots and select **Reassign**.
4. To delete a document,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

---

## 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)

2 AC isolator - IMO - 40A 4-pole

4 MC4 4mm Connector Pair

1 50m reel of 4mm2 solar cable

40 Fastensol black universal clamp

20 Fastensol black end cap

40 Fastensol landscape slate roof hook

10 Fastensol silver rail 3550mm

Total (ex VAT and delivery)

Not a stock item

£36.40 £72.80

£3.00 £12.00

£42.00 £42.00

£1.54 £61.60

£0.63 £12.60

£5.18 £207.20

£25.20 £252.00

£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:

Subject:

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* →

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**.

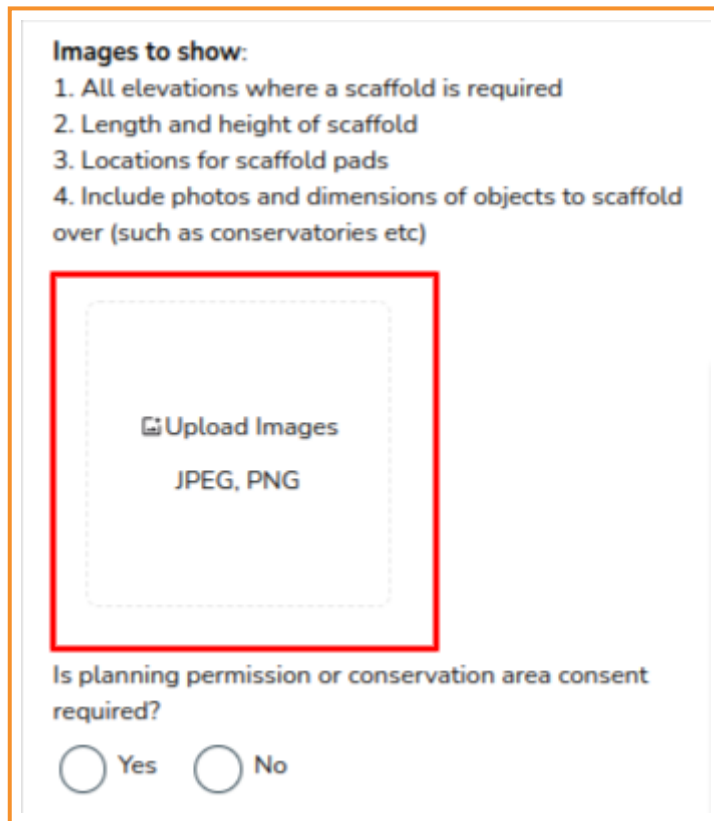
### Filling out

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

The image shows two side-by-side screenshots of the application interface, each representing a different task form. Both forms have a top navigation bar with a back arrow and the text 'Project Overview'. The left form is titled 'Solar Survey' and features a list of sections on the right side: 'Access and safety' (highlighted with a red border), 'Roofs', 'Loft access', 'Existing electrics', 'PV inverter', 'Battery system', 'Communication cables and connectivity', 'Consumption', and 'Additional comments and images'. The right form is titled 'Installation record' and features a list of sections on the right side: 'Roofs' (highlighted with a red border), 'Inverters', 'Electrical', 'Monitoring system', and 'Further information'.


### 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.

