

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 project overview interface. At the top, a navigation bar includes 'Projects', 'Tasks', 'Components', 'Forms', 'Reports', and 'Help'. The main content area is divided into several sections:

- Lead**: A dropdown menu showing 'Mon Jun 17 2024' and the address '61 High Street Cambridge Cambridgeshire CB22 6RP'. Below this are three 'Add details' buttons.
- Roof**: A list of components including Panels, Inverter, Electrical, Performance, Consumption, Structural, Schematic, Financial, Surveys, Customer Proposal, and Installation record.
- Incomplete Forms**: A list of forms 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'.
- Documents**: A section highlighted with a red border, containing an 'Upload' button and a list of 'Uploaded Documents' (including a PDF file named 'growatt-warranty-...') and 'Reports' (including 'PV Array Test Report', 'PV Array Test Report V2', 'G99 50KW - DNO...', 'Customer Proposal', 'Survey', and 'See All').
- DNO Application**: A section with a 'Total (ex VAT)' field and a note 'Midsummer account unlinked - Connect account for more accuracy'.
- Emails**: A section with a list of emails including '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 CO₂ 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.

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