

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 project management. The top navigation bar includes 'Projects', 'Tasks', 'Components', 'Forms', 'Reports', and 'Help'. The left sidebar lists various project components: 'Lead', 'Roof', 'Panels', 'Inverter', 'Electrical', 'Performance', 'Consumption', 'Structural', 'Schematic', 'Financial', 'Surveys', 'Customer Proposal', and 'Installation record'. The main content area is divided into several sections. The 'Incomplete Forms' section lists documents like '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 'Documents' section, highlighted with a red box, shows 'Uploaded Documents' (a PDF icon labeled 'growatt-warranty-...') and 'Reports' (icons for 'PV Array Test Report', 'PV Array Test Report V2', 'G99 50KW - DNO...', 'Customer Proposal', 'Survey', and 'See All'). The right sidebar contains a 'DNO Application' section and an 'Emails' section with a 'Quotation' button.

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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