

Share projects and components

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.

View and edit the default sharing of projects and components

Each user in a Pro team can configure default sharing settings for the projects and components they create. Navigate to **My account > Preferences > General** and then **Default sharing**. In this section, simply select which sharing permissions you would like to be granted automatically when creating a project or component.

Projects
SUNMAX

View

Edit

Delete

Change owner

Components
SUNMAX

View

Edit

Delete

Change owner

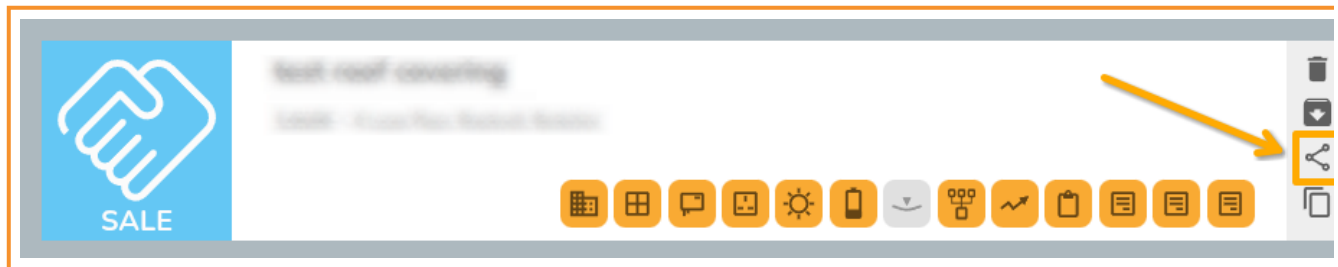
Default sharing
When you create new projects or components you can choose if they should be automatically shared with your colleagues. Click to toggle the rights you want to give the people you can share with.

Manually share projects or components

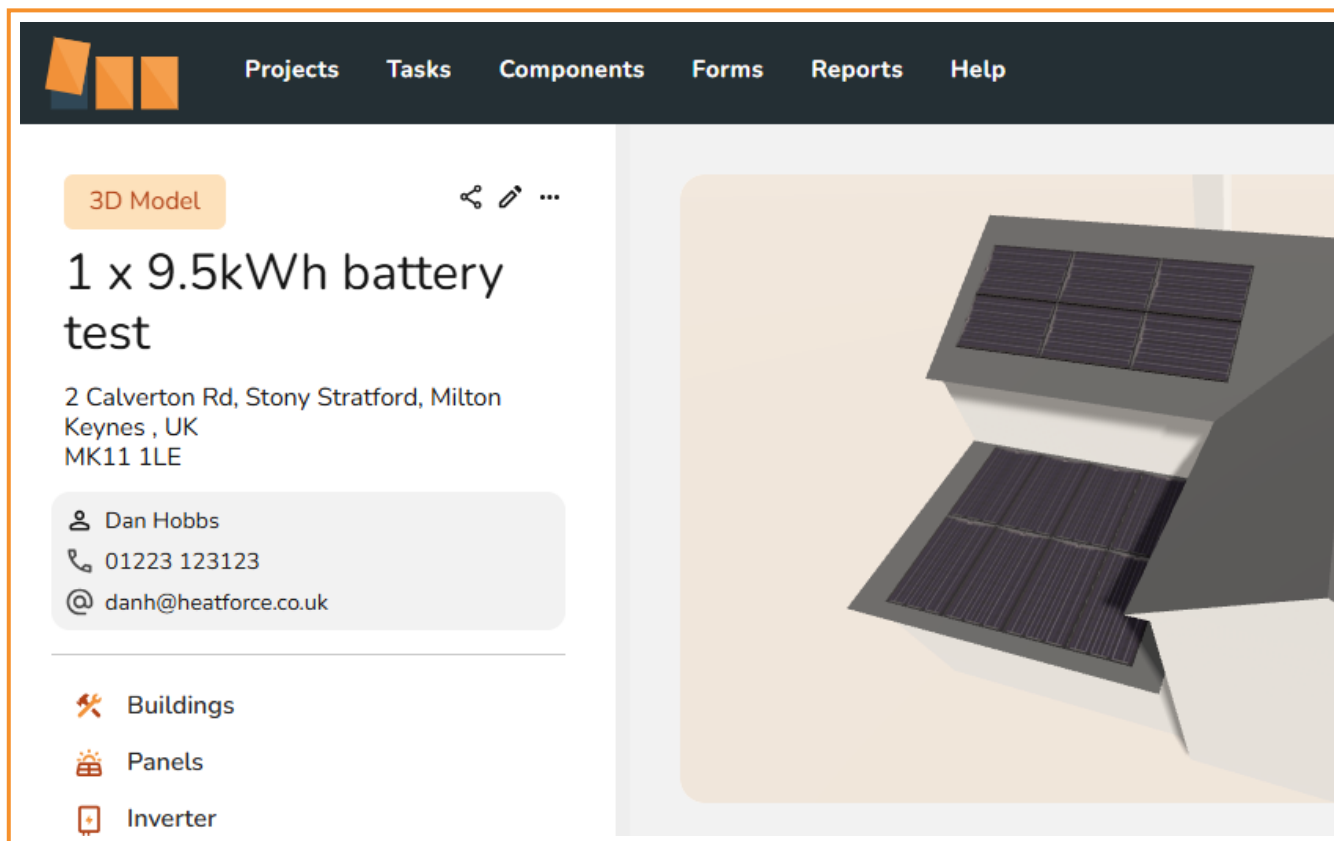
Share a project

You can share a project via your list of projects on the My Projects page, or via the project overview page on a specific project.

- From your project list on the **My Projects** page - click on the share icon on the project you want to share, then follow the instructions below.



- From the **project overview** page of a specific project - click on the share icon in the top left of the project.



Share a component

If you are using [custom components](#) in Easy PV, you can share those owned by you with other members of your team. Hover over the Components option in the main site navigation and then select the component type to find the component you want to share. Click on the share icon to configure sharing for the component.

Note: For custom inverters and solar panels, you need to share both the manufacturer group and the individual component.

Example manufacturer

Name:

Description:

Type: ▼

Not used in any projects

Example inverter

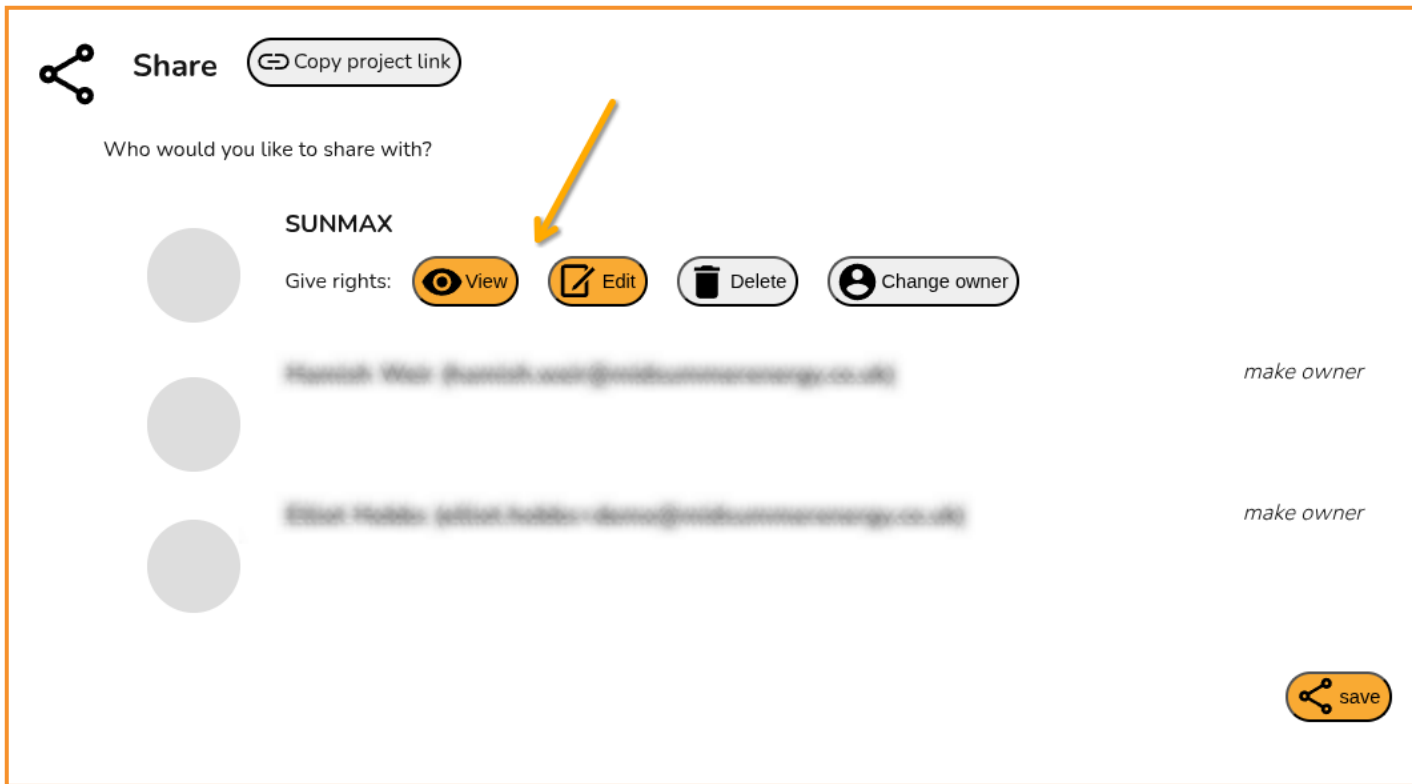
Not used in any projects

[+] Add inverter

Note: The ability to share projects and components will only show on projects owned by you.

Configure the sharing settings

Once you have chosen the product or component you want to share, you can then **select the team** you want to share with and **set the permissions** you want to apply. 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.



Once you have shared a project with a user, you can use the **copy project link** button to get the URL of the project to share directly.

Understanding permission types

- **View:** users will be able to view the project, but not edit it.
- **Edit:** users will be able to view and edit the project.
- **Delete:** Users will be able to permanently delete the project or component.
- **Change owner:** Users will be able to transfer ownership of the project or component to another user (see below).

Transfer ownership to another user

If you want to change ownership of the product or component, click on the **make owner** button beside the name of an individual user in your team. This will assign ownership to that user and you will no longer have permissions to configure sharing.

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

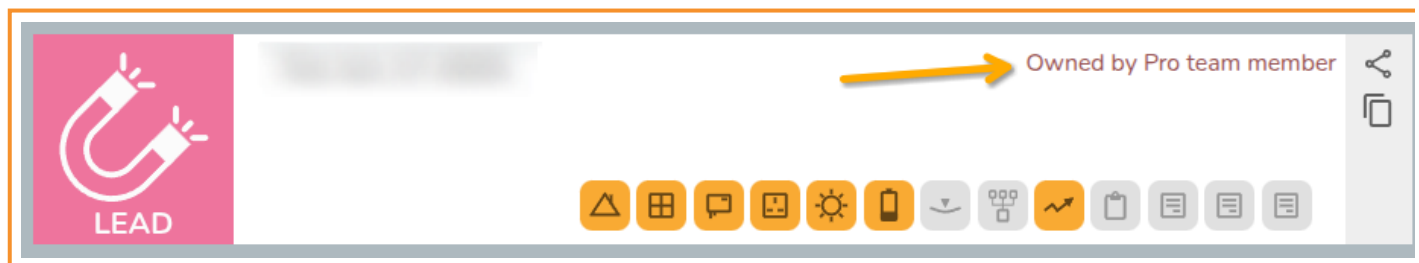
Show projects modified in the last...

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!

