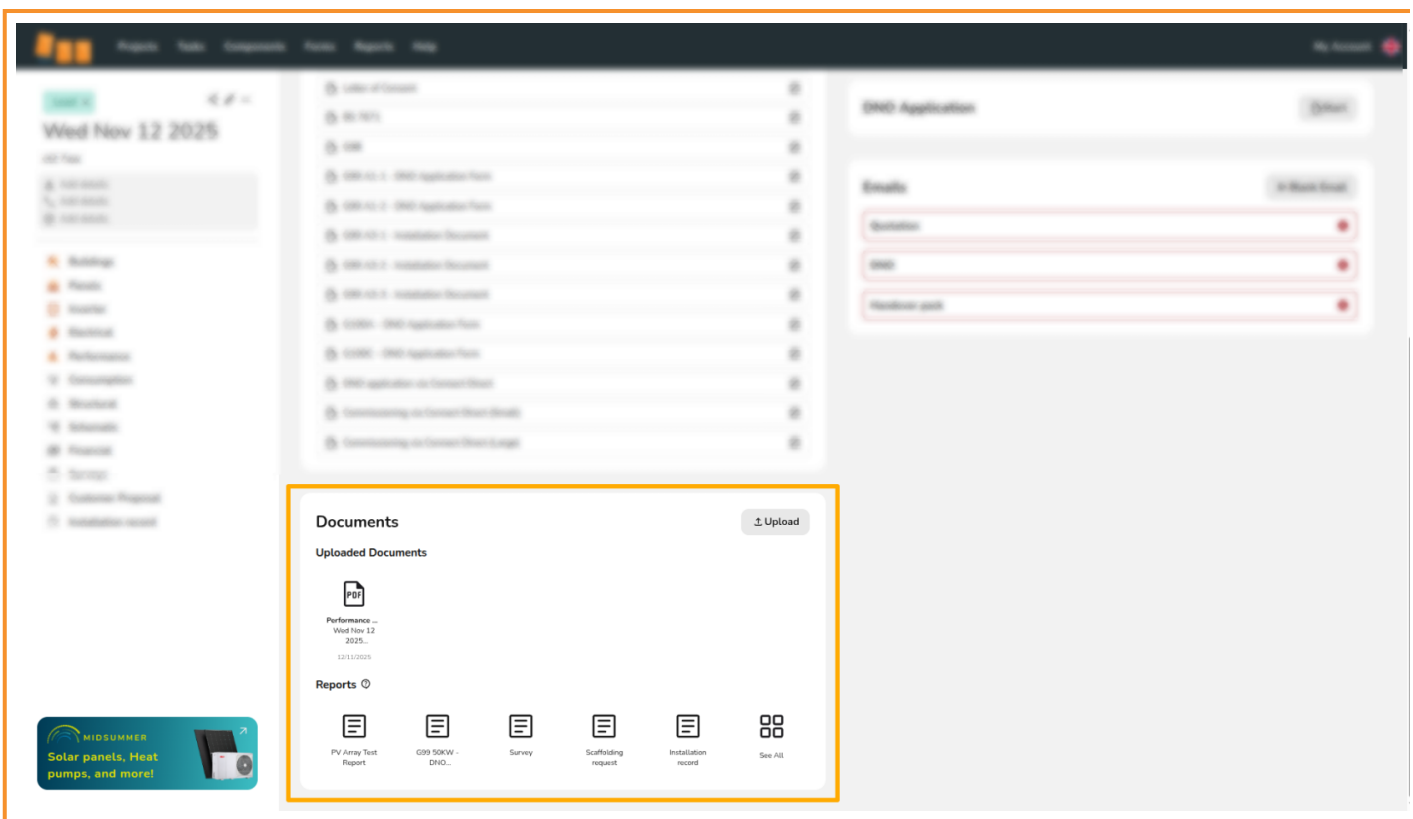


# Pro: Document Management

This guide applies to **pro** versions of Easy PV. [Read more](#) about what you gain with pro.

With Easy PV Pro's document management options, all project files – surveys, proposals, reports, customer documents – can be stored in one place, with no need for a separate QMS system. This allows you to keep track of everything you need for a project in one place. Documents uploaded here can also be attached to any [emails sent within the Easy PV](#).

The document management section can be found at the bottom left of the project overview.

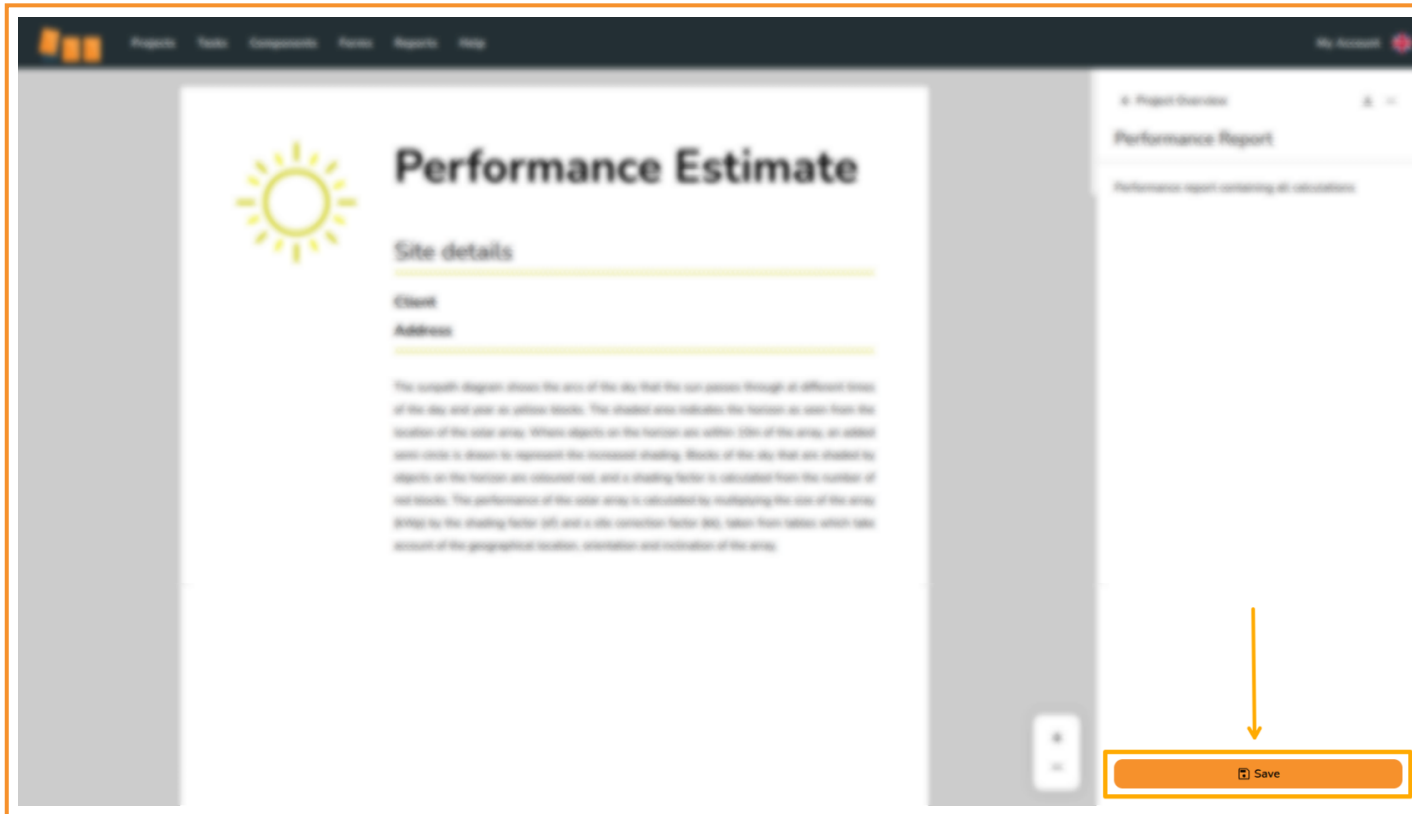


## Uploading files to the document manager

Files can be saved directly from a project or uploaded from your device. These can also be sent in emails through Easy PV. If you have team files you'd like accessible on all projects when sending emails, you can upload these to your team uploads.

## Saving an Easy PV report to the document manager

When previewing any report in Easy PV, you will see a **menu on the right-hand side with a save button at the bottom**. This will save the file to the document manager.



If you make changes to a document, you will need to re-save it for the updates to appear in the document manager.

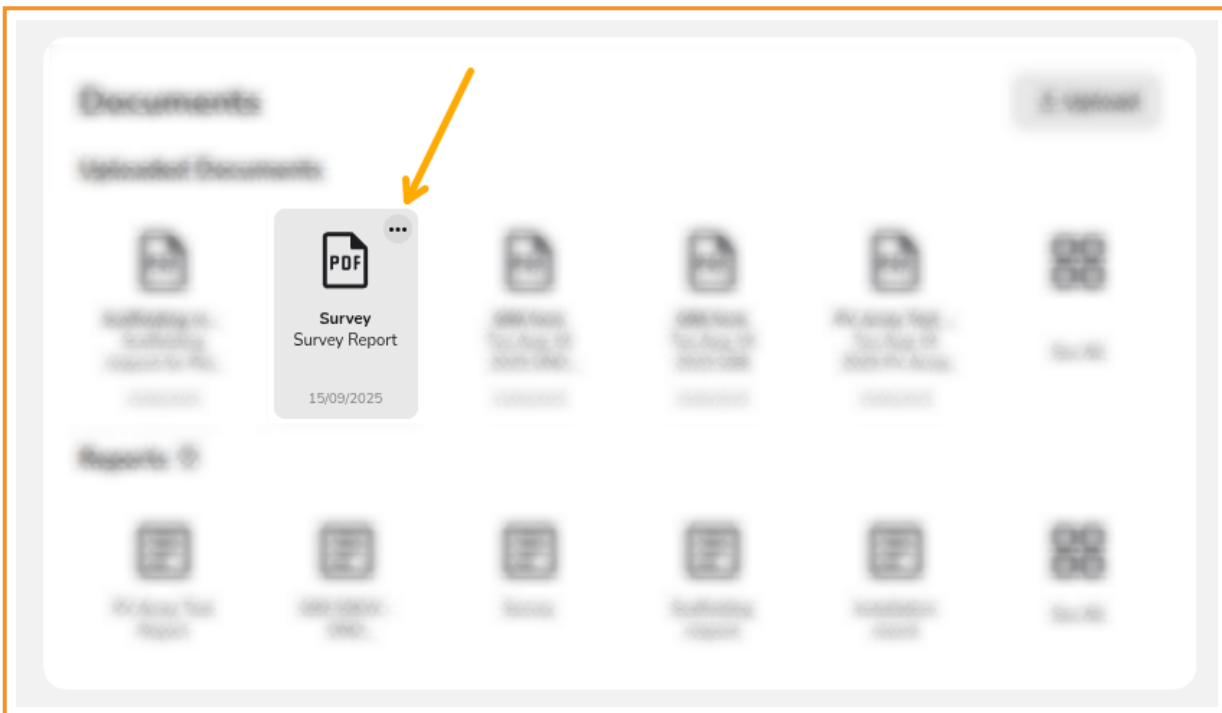
## Upload a document from your device

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



## Options on saved files

To edit the details on any saved files, click the three dots



You will then see the following options:



### **Rename**

The file name will display if it's sent in any emails in Easy PV. You can change the name of a file by clicking **Rename**



### **Reassign**

Each file you upload has a type, this is used when [sending emails in Easy PV](#). To reassign this type, click the three dots and select **Reassign**.



### **Download**

If you'd like to download any of the files you've added to your project, click the **Download** button.



### **Delete**

To delete a document, click **Delete**. This will delete the saved version of the document from the file management section of your project.

---

Revision #19

Created 19 September 2024 11:12:39 by Cammie Settle

Updated 3 March 2026 12:58:30 by Daisy