

Pro: Sending emails from Easy PV

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

With pro, you have the option to send emails without needing to leave Easy PV. This includes sending e-signing links and uploading any attachments from your project or team documents.

Sending emails in Easy PV

Emails can be sent from the templates in the project overview or from within individual documents.

If you'd like to [send a document for e-signing](#), these must be sent from within individual documents.

Emails from the project overview

You can access the email management section via the project overview. Here you can keep track of emails that have been sent. Emails that have not yet been sent will be outlined in red with a cross. Once you have sent an email, it will be outlined in green with a tick.

To send emails from this section just click on the one you'd like to send or 'blank email' and follow the [steps below](#).

The screenshot shows the Easy PV software interface. On the left is a navigation menu with categories like Buildings, Plans, Invoice, Material, Performance, Consumption, Schematic, Financial, Service, Customer Proposal, and Installation record. The main area displays a project overview for 'Project ID' with sections for 'Complete Plans' and 'Incomplete Plans'. A table on the right lists various documents with their dates and statuses. At the bottom right, a 'DND Application' button is visible. A yellow box highlights the 'Emails' section, which includes a '+ Blank Email' button and three email types: 'Quotation' (with a green checkmark), 'DNO' (with a red X), and 'Handover pack' (with a red X).

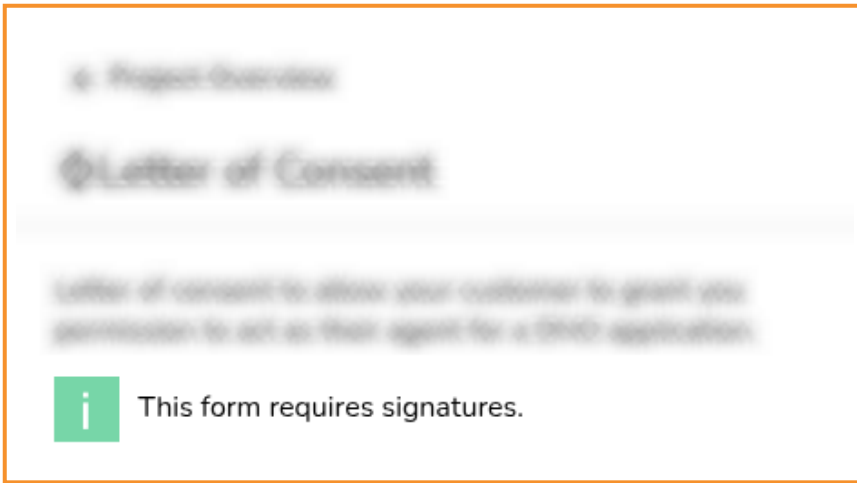
Required attachments

Emails from the project overview will have required attachments, if you have already [uploaded the file to the project](#), these will automatically attach.

If you would like to use a different document to one generated in Easy PV. For example you would like to use a different schematic, then you can [upload this to the document management](#) and [reassign the type](#) to 'Schematic'. After doing this, it will automatically attach to any emails that require a schematic.

Emails for e-signing

Documents that can be sent for e-signing will display this in the document form:



When you generate the PDF, you will then see the option in the bottom left to send the e-signing link as an email:



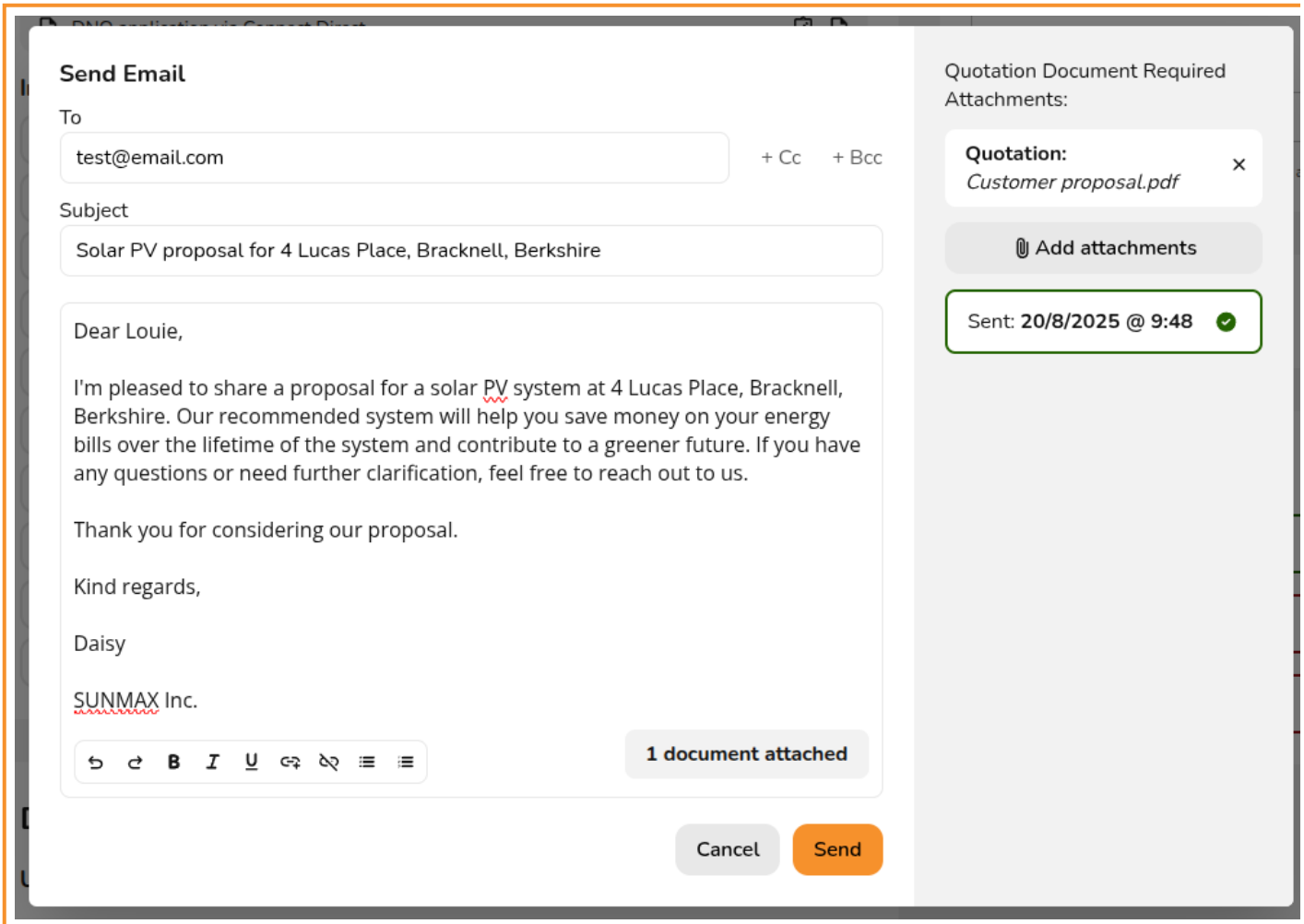
[Read here](#) for more information on e-signing.

Editing and sending an email

When you select one of the options detailed above, it will open an email window like the one shown below. If you have filled in the customer's email in the project details, this will automatically populate in the 'To' field.

The any required documents will automatically attach to the email if it has been saved to the [file management section](#). You can add other attachments and then click **Send** when you are ready to send.

After you have sent the email, you will see on the left of the email the date and time that it was sent with a green tick.



Sending emails from your domain

By default, emails in Easy PV will send from a no reply address but these can be set up to [send from your email address](#).

Revision #18

Created 19 September 2024 12:53:45 by Cammie Settle

Updated 3 March 2026 12:58:30 by Daisy