



User guide: Manage your account / subscription

1.	Purpose of this document	1
2.	Sign up for a trial account.....	2
3.	Your (trial) subscription.....	5
4.	Change your subscription	6
5.	Billing information when you change your subscription	9
6.	Automatic renewal.....	12
7.	Changing / adding company information.....	13
8.	Changing company name and logo.....	15
9.	2 Factor Authentication.....	15
10.	Link users to your account	17
11.	De-linking users from your account	20
12.	Removing users from your account	21

1. Purpose of this document

In this document we'll explain how you can manage account access and managing the settings of our account. The basics.

This guide is only intended for the account responsible(s). Within Easy to Inspect this are users with the role 'System Admin'.





2. Sign up for a trial account

When you click on “start now, 30 days for free”, you can sign up for a trial account. This trial account gives you access to all standard features of Easy to Inspect for 30 days. You can, with 4 other users try out the benefits of Easy to Inspect. Additionally, also 10 other users can be linked to your account who can take action if deviations are detected during inspections.

After 30 days your account will expire automatically.

Our sign-up page will open and you need to complete your details. All mandatory fields are marked.

Try out during 30 days for free, without any obligations

With our trial account, you can experience all features of Easy to Inspect. Invite 4 other colleagues to join you and work together to find out all benefits. Use our help guides to start quickly. Your trial account will be closed after 30 days automatically.

Pay attention! We will send the inspection reports automatically by email. Therefore, please use a working e-mail address.

Personal
Your personal user information.

Your name

Your email

Your password

Confirm password

Organisation
Your organisation information.

Name of your organisation

Address

City Zip code

Country

Telephone





If you are already known within Easy to Inspect, you cannot create an account with the same email address. Our system will notify you.

Personal
Your personal user information.

Your name
Demo name

Your email
demo@easytoinspect.com

Your password
.....

Confirm password
.....

When all mandatory fields are filled, you can start with Easy to Inspect.

Organisation
Your organisation information.

Name of your organisation
DEMO

Address
Demo lane 1

City
Democity

Zip code
1234

Country
Nederland

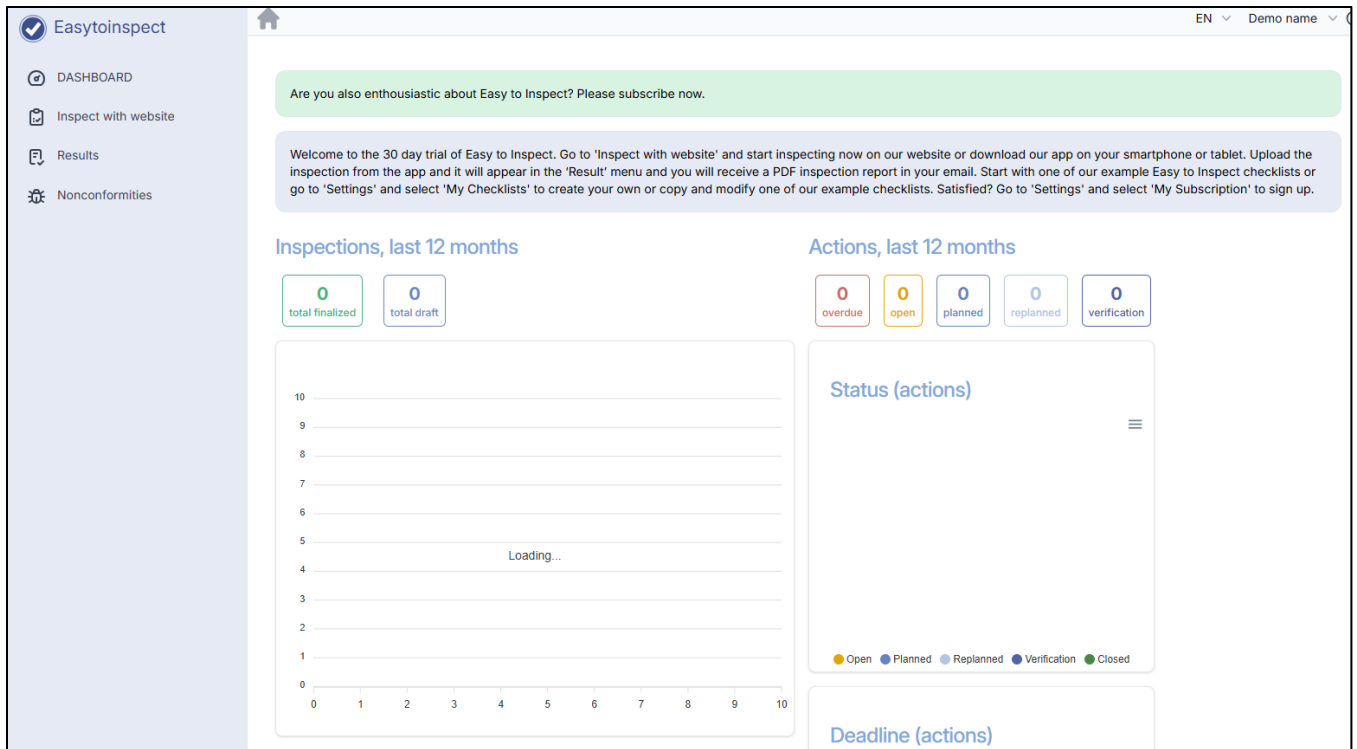
Telephone
+311234567890

I agree with the general terms and conditions
[Read the general terms and conditions here](#)

Cancel **Start with Easy to Inspect**



Once started, the website will open in our user environment. You will start in our dashboard. Of course, this dashboard is still empty.



With the same credentials: Email and password, you can logon to the inspection app on your mobile device.

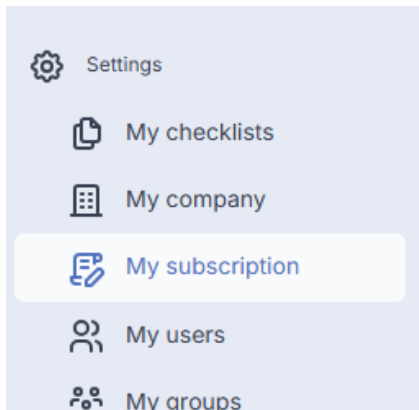




3. Your (trial) subscription

You can find your account details in the menu bar at the left of the 'menu' when you're logged on at Easy to Inspect.

If you don't see that menu item in the settings menu, you're not the administrator of the account.



Select "My subscription" to check your current status.

In case of a trial account, it will display such.

In case of trial accounts, additional features are not available. When you change your account during the trial, and add additional features, we immediately start invoicing.

The screenshot shows the 'My subscription' page in the Easy to Inspect interface. The page is titled 'Settings > My subscription' and includes a navigation menu on the left with options: DASHBOARD, Inspect with website, Results, and Nonconformities. The main content area is divided into two tabs: 'My subscription' (selected) and 'History'. Under the 'My subscription' tab, there is a section titled 'Your current subscription' with the subtitle 'Overview of your current subscription settings'. The subscription details are as follows:

Date start	Date end	Days remaining: 30
16-01-2025	15-02-2025	

Additional settings include:

- Number of users: 5
- Number of action only users: 10
- 30 day free trial-account
- Relational API (API) enabled
- Result API (API) enabled
- Filter based email enabled
- High quality PDF email enabled

A 'Change your subscription' button is located at the bottom of the page.





4. Change your subscription

If you would like to change your subscription because you would like for instance to add the filter based reporting function, you click on 'change your subscription'.

The screenshot shows a user interface for managing a subscription. It has two tabs: 'My subscription' (selected) and 'History'. Under 'My subscription', there is a section titled 'Your current subscription' with the subtitle 'Overview of your current subscription settings'. This section contains several input fields and checkboxes:

- Date start:** 16-01-2025
- Date end:** 15-02-2025
- Days remaining:** 30
- Number of users:** 5
- Number of action only users:** 10
- 30 day free trial-account
- Relational API (rAPI) enabled
- Result API (API) enabled
- Filter based email enabled
- High quality PDF email enabled

At the bottom of this section is a green button with a pencil icon and the text 'Change your subscription'. A red arrow points from the text in the paragraph above to this button.





The page will expand and display your options. scroll down to the desired option and select it.

The screenshot shows the 'My subscription' page with the following sections:

- Your current subscription:** Overview of your current subscription settings. Includes fields for Date start (16-01-2025), Date end (15-02-2025), Days remaining (30), Number of users (5), and Number of action only users (10). There are checkboxes for: 30 day free trial-account (checked), Relational API (rAPI) enabled, Result API (API) enabled, Filter based email enabled, and High quality PDF email enabled.
- Users:** Select the number of users. Radio button options: 5 (Yearly: € 430,00) (Current subscription), 10 (Yearly: € 825,00) (selected), 15 (Yearly: € 1.200,00), 20 (Yearly: € 1.595,00), and 25 (Yearly: € 1.920,00).
- Relational API (rAPI):** API (read-only) for BI-tools. Connect with PowerBi or data warehouse. Description: You can use our relational API (read-only) to connect Easy to Inspect to your Business Intelligence (BI) tool (like PowerBi) or your data warehouse. You can find out more about this option here: <https://www.easytoinspect.com/site/support>. Price: (Yearly: € 481,00).
- Result API:** Import inspection results & photos with our result API in your own software. Description: You can use our result API to report data and photos from specific inspections from Easy to Inspect to your software (or data warehouse). You can find out more about this option here: <https://www.easytoinspect.com/site/support>. Price: (Yearly: € 806,00).
- Filter based email:** Send CC-email with inspection report and / or action report. Assign actions automatically. Based on filter values. Description: This option lets you automatically share the results of an inspection with other users, sending them a copy of the inspection report and/or assigning actions and notifying the person responsible by email. You'll need to use the filter function to create pre-defined lists. You can find out more here: <https://www.easytoinspect.com/site/support>. Price: (Yearly: € 276,00). A green box on the right shows 'Price: € 276,00'.
- High quality pdf email:** Email pdf-reports with high quality photos. Limitations apply. Description: Our standard PDF reports are designed to be as efficient as possible, so you can send even the largest reports by email. In some cases, you might want to focus on the details in the images, using this option makes the photos in the reports look their best. Just be aware, there are some conditions and restrictions! You can read about them here: <https://www.easytoinspect.com/site/support>. Price: (Yearly: € 216,00).
- Start:** Set the start date of the subscription. Radio button options: Start my subscription today (selected). Includes Date start (16-01-2025), Date end (28-02-2026), and a checked checkbox for Auto renew my subscription.

When you click on your option, the additional price, until the end of your current subscription period will be calculated.

This is a close-up of the 'Filter based email' option from the previous screenshot. It shows the description, the selected radio button, the price '(Yearly: € 276,00)', and a green box on the right that says 'Price: € 276,00'.





We always provide an overview with a summary of your billing information.

Rates are displayed as annual rates. The amount invoices will be the calculated to the end of the current subscription period. So, if you account is only valid for another 8 months, the additional service will be calculated for the remaining subscription period of 8 months.

After selecting you subscription changes, select continue to update your billing information.

Filter based email

Send CC-email with inspection report and / or action report. Assign actions automatically. Based on filter values

(Yearly: € 276,00)

Price: € 276,00

High quality pdf email

Email pdf-reports with high quality photos. Limitations apply.

(Yearly: € 216,00)

Start

Set the start date of the subscription

Start my subscription today

Date start **Date end**

Auto renew my subscription

Order

Summary of your order

Subscription for Easytoinspect.com APP and SAAS DEMO, number of users 5 (16-01-2025 / 28-02-2026)	
Filter based email	€ 276,00
SUBTOTAL	€ 276,00
VAT	€ 57,96
TOTAL DUE	€ 333,96

Continue to update your billing information





5. Billing information when you change your subscription

After you have changed your subscription, you return to the 'My subscription' screen.

You will see a display of your settings.

When you scroll down in this screen, you see the fields that must be filled in regarding the invoice.

My subscription
History

Your current subscription
Overview of your current subscription settings

Date start
16-01-2025

Date end
15-02-2025 Days remaining: 30

Number of users
5

Number of action only users
10

30 day free trial-account

Relational API (rAPI) enabled

Result API (API) enabled

Filter based email enabled

High quality PDF email enabled

Your changed subscription
Overview of your subscription after you place the order

Number of users
5

Number of action only users
10

Relational API (rAPI) enabled

Result API (API) enabled

Filter based email enabled

High quality PDF Email enabled

Order
Summary of your order

Subscription for Easytoinspect.com APP and SAAS
DEMO, number of users 5 (16-01-2025 / 28-02-2026)

Filter based email	€ 276,00
SUBTOTAL	€ 276,00
VAT	€ 57,96
TOTAL DUE	€ 333,96

Billing information
With this information, your invoice will be made. Correct entry is required.

Name of your organisation *

Department

Address *

City *

Zip code *

Country *





Once you have filled in all required fields, you can place your order.

Please do include a reference number or an (internal) PO number if available.

Billing information
With this information, your invoice will be made. Correct entry is required.

Name of your organisation *
DEMO

Department
Safety department

Address *
Demo lane 1

City * Democity **Zip code *** 1234

Country *
Nederland

Contact *
demo1-user

Send the invoice to this email address *
invoice@democompany.com

VAT number

Billing reference
PO-123456789

Remarks

Your account will be activated immediately when you place your order. We will send you an invoice with all details for the payment by email. Payment can be done by bank transfer or via our payment provider Mollie. With this order you agree to pay the amount mentioned above according to our terms and conditions.

[Back](#) [Place your order now with obligation to pay](#)

A confirmation pop notification will pop up

Your account will be activated immediately with obligation to pay, when you click on OK.

OK

Annuleren





You can check your subscription settings via the main menu again. Menu, My subscription.

My subscription History

Your changed subscription
Your changed subscription

Date start 16-01-2025 **Date end** 28-02-2026

Number of users 5 **Number of action only users** 10

Relational API (rAPI) enabled
 Result API (API) enabled
 Filter based email enabled
 High quality PDF email enabled

Last changed: 16-01-2025

This is to confirm that your subscription was changed on 16-01-2025 to the one detailed above. You are free to change your new subscription until the end of the month, since we will invoice you at the beginning of next month.

[Change your subscription](#)

In the tab history you can see an overview of all historical changes made to your subscription.





6. Automatic renewal

Your **trial account** will automatically expire.

Once you choose to continue using Easy to Inspect with a paid subscription, your subscription will be renewed automatically. You can undo this, by deselecting your auto renewal.

Select menu, my subscription, select change subscription, deselect auto renewal.

The image shows two screenshots of the subscription settings interface, illustrating the process of disabling automatic renewal. A red curved arrow points from the top screenshot to the bottom one.

Top Screenshot (Auto renewal enabled):

- Start**
Set the start date of the subscription
- Start my subscription today
- Date start**: 16-01-2025
- Date end**: 28-02-2026
- Auto renew my subscription

Bottom Screenshot (Auto renewal disabled):

- Start**
Set the start date of the subscription
- Start my subscription today
- Date start**: 16-01-2025
- Date end**: 28-02-2026
- Auto renew my subscription

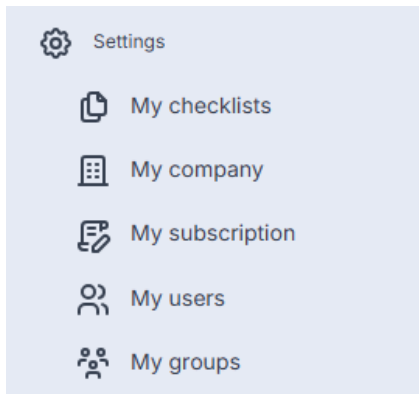
Such change can also be made via the 'My company' menu (see chapter 7).





7. Changing / adding company information

Your company details can be viewed via the main menu, selection 'My company'. You can find the settings option in the left down corner of the blue bar.



Once you selected 'My company', your organisation details will be displayed.

Now, you can:

- ✓ Change automatically renewal of your subscription
- ✓ Enter alternative billing address information
- ✓ Provide information about primary contact persons
- ✓ Customise the logo and company name displayed in the App and the inspection reports.
- ✓ Enable 2 Factor authentication for all users

Please note!

The information you include in this menu is used to make your invoices when you continue working with Easy to Inspect after the trial period. If the information is wrong, your invoice will be wrong. Since this is an automatic process, we cannot issue new invoices.

If your company is based in the European Union, please provide your VAT number to apply for a VAT deduction. An automatic VAT number check applies, only valid numbers are accepted.



**Organisation**

Your organisation information

Name

DEMO

Address

Demo lane 1

City

Democity

Zip code

1234

Country

Nederland

Telephone

+311234567890

Billing informationWith this information, your invoice will be made.
Correct entry is required. Automatically renew subscription Use alternative billing information**Email for the invoice****VAT number****Billing reference****Name of the billing contact****Primary contact**

Your primary contact for the subscription

Name of the primary contact**Email of the primary contact****Remarks****Customisation**

Easy to Inspect adapted to your company

Short name

Name of organisation displayed in website, App & reports. The (shortened) company name can be up to approx. 75-20 characters

Logo

Logo of organisation. You can upload your company logo here (max. 250 x 250 pixels, png, jpg). This is used in various reports.

Bestand kiezen

Geen bestand gekozen

Advanced settings

Configure advanced settings such as: 2-factor authentication, API access, filter based email and high quality PDF report by email

2-factor authentication Enable 2-factor authentication for all users in this account**Save** Cancel



8. Changing company name and logo

You can customise your company name and logo. The name and logo will be displayed in the App for phone and tablet and will also be displayed on the inspection reports.

Customisation
Easy to Inspect adapted to your company

Short name
Name of organisation displayed in website, App & reports. The (shortened) company name can be up to approx. 15-20 characters

EASY TO INSPECT

Easy to Inspect
check, report analyse

Choose file logo banner 2024.png

9. 2 Factor Authentication

As system administrator, you can require that all users must use 2 factor authentication when working on Easy to Inspect.

2-FA is not required when working in the App or uploading inspection results.

2-FA only applies to our webbased environment.

If you decide to make 2-FA not mandatory, users can always decide themselves to use 2-FA. As a default setting such is not mandatory.

We recommend that you require the use of 2-FA.

You can do so via the settings menu, option My Company, scroll down to Advanced settings and save your settings.


Advanced settings
Configure advanced settings such as: 2-factor authentication, API access, filter based email and high quality PDF report by email

2-factor authentication
 Enable 2-factor authentication for all users in this account






Once this setting is done, each user must, when he/she logs in, first set up the 2-factor authentication with a 2-factor authentication app via a mobile device. After configuration, the user can login with 2-FA.



Sign in to your account


Configure the 2-factor authentication app on your mobile device. Scan the QR-code with your 2-factor authentication app. The app displays a six-digit code, that you have to enter below.



Your 2-factor code

Configure

Once, the user has configured the 2-FA, the user must enter the code every time when the user logs on at the website of Easy to Inspect.



Sign in to your account

Open your authentication app and enter the code for Easy to Inspect. Trouble logging in? Contact us!

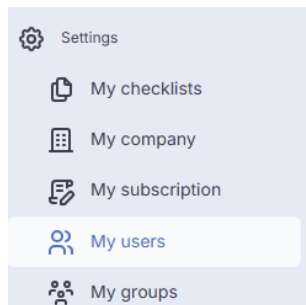
Sign in



10. Link users to your account

When you would like to link a user to your account, you go to the main menu, select settings and then you select My users.

Note: only the users with the role 'system administrator' have this option. Other users will not see the 'settings' menu. There must always be one user with this role. Easy to Inspect will automatically prevent that the last user with this role will be de-activated.

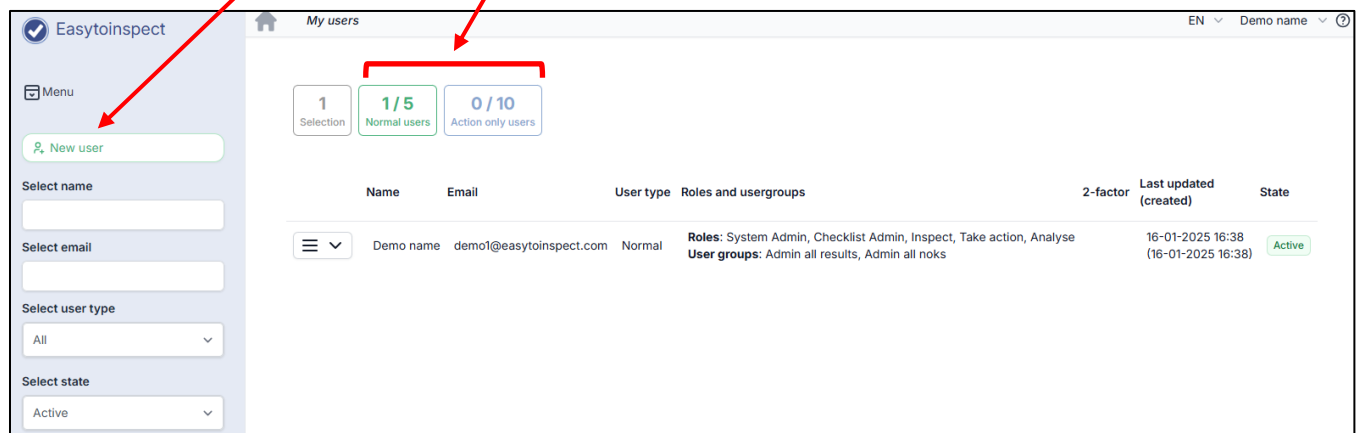


When you select My users, a screen will open that displays all users within your account.

This screen provides information about:

- ✓ The number of assigned / available normal users (users with inspection rights).
- ✓ The number of assigned / available action only users (users who can only take actions on non-conformities resulting from inspections).

If you would like to link a member of your organisation to your account, select 'New user' in the left hand side menu bar.



Name	Email	User type	Roles and usergroups	2-factor	Last updated (created)	State
Demo name	demo1@easytoinspect.com	Normal	Roles: System Admin, Checklist Admin, Inspect, Take action, Analyse User groups: Admin all results, Admin all noks		16-01-2025 16:38 (16-01-2025 16:38)	Active

Then fill in the users details in the mandatory fields:



Personal Information

Your username and sign-in email. We will use this email for a password reset request.

Name

Sign-in email

Other settings

The user type of this user and the preferred language of the user.

User type

Language

Security settings

Password and 2-factor setting

Password

Password confirmation

Require 2-factor authentication (2FA) for this user

Save
Cancel

You must select if the user is an inspector (normal user) or an action only user. Furthermore, you must define the roles the users will have. (see our help guide on user rights).

Note: The user can change the password himself afterwards. In case the company settings are such that 2-FA is required for all users (see chapter 9), the tick box will not influence the settings.

Once finished, the user is linked to the account.

Easytoinspect
My users
EN Demo name

Menu

Select name

Select email

Select user type

Select state

4 Selection

3 / 5 Normal users

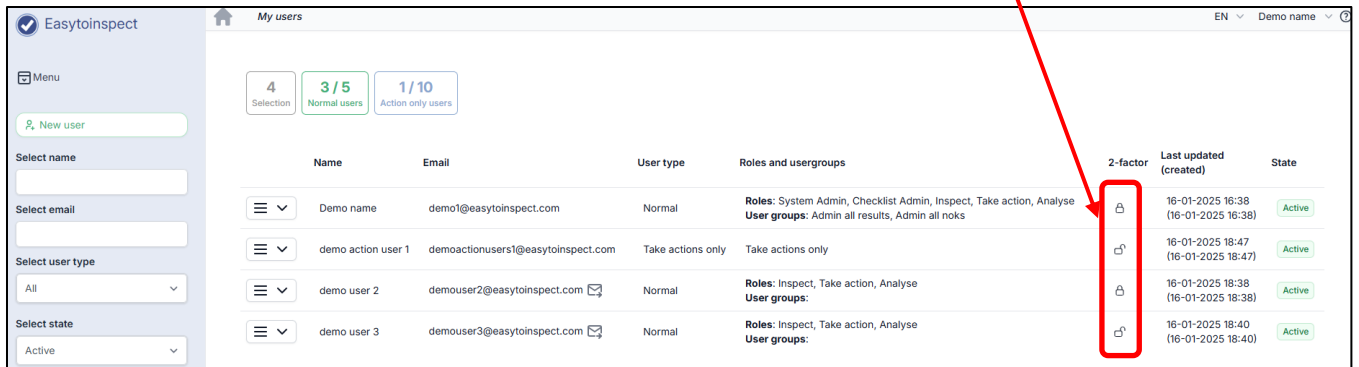
1 / 10 Action only users

	Name	Email	User type	Roles and usergroups	2-factor	Last updated (created)	State
☰	Demo name	demo1@easytoinspect.com	Normal	Roles: System Admin, Checklist Admin, Inspect, Take action, Analyse User groups: Admin all results, Admin all noks	☞	16-01-2025 16:38 (16-01-2025 16:38)	Active
☰	demo action user 1	demoactionusers1@easytoinspect.com	Take actions only	Take actions only	☞	16-01-2025 18:47 (16-01-2025 18:47)	Active
☰	demo user 2	demouser2@easytoinspect.com	Normal	Roles: Inspect, Take action, Analyse User groups:	☞	16-01-2025 18:38 (16-01-2025 18:38)	Active
☰	demo user 3	demouser3@easytoinspect.com	Normal	Roles: Inspect, Take action, Analyse User groups:	☞	16-01-2025 18:40 (16-01-2025 18:40)	Active

You can see the number of users that are linked to your account.



In case 2-FA is applicable, this is displayed with a lock. For new users, the lock is still open since the user must establish the final steps of the 2-factor authentication him/herself.



Name	Email	User type	Roles and usergroups	2-factor	Last updated (created)	State
Demo name	demo1@easytoinspect.com	Normal	Roles: System Admin, Checklist Admin, Inspect, Take action, Analyse User groups: Admin all results, Admin all noks	🔒	16-01-2025 16:38 (16-01-2025 16:38)	Active
demo action user 1	demoactionusers1@easytoinspect.com	Take actions only	Take actions only	🔒	16-01-2025 18:47 (16-01-2025 18:47)	Active
demo user 2	demouser2@easytoinspect.com	Normal	Roles: Inspect, Take action, Analyse User groups:	🔒	16-01-2025 18:38 (16-01-2025 18:38)	Active
demo user 3	demouser3@easytoinspect.com	Normal	Roles: Inspect, Take action, Analyse User groups:	🔒	16-01-2025 18:40 (16-01-2025 18:40)	Active





11. De-linking users from your account

It is not possible to delete users that are known in your account.

If you would delete a user, all inspection reports or action reports would be impacted.

You can however de-activate a user.

Select 'setttings' in the main menu, select my users, select that action button of the user.

	Name	Email	User type	Roles and usergroups	2-factor	Last updated (created)	State
	Demo name	demo1@easytoinspect.com	Normal	Roles: System Admin, Checklist Admin, Inspect, Take action, Analyse User groups: Admin all results, Admin all noks		16-01-2025 16:38 (16-01-2025 16:38)	Active
	demo action user 1	demoactionusers1@easytoinspect.com	Take actions only	Take actions only		16-01-2025 18:47 (16-01-2025 18:47)	Active
	demo user 2	demouser2@easytoinspect.com	Normal	Roles: Inspect, Take action, Analyse User groups:		16-01-2025 18:38 (16-01-2025 18:38)	Active
	demo user 2	demouser3@easytoinspect.com	Normal	Roles: Inspect, Take action, Analyse User groups:		16-01-2025 18:40 (16-01-2025 18:40)	Active

Click on de-activate.

The users that are deactivated, can be found via the filter menu in the left hand side blue bar.

	Name	Email	User type	Roles and usergroups	2-factor	Last updated (created)	State
	demo user 2	demouser2@easytoinspect.com	Normal	Roles: Inspect, Take action, Analyse User groups:		16-01-2025 18:38 (16-01-2025 18:38)	Inactive





12. Removing users from your account

It is not possible to delete users that are known in your account.

We know examples that users were transferred from one Easy to Inspect account to another. This is not possible when users are known under the same email address.

Since users, and their inspection reports, can not be removed, they can only be de-activated and / or changed.

For instance; you can change the user settings such, that the email address is modified and no longer working.

Example:

User1@easytoinspect.com must not only be inactivated, but this user must be linked to another Easy to Inspect account.

You must now change the user settings:

- Change the email address into [user1\(expired\)@easytoinspect.com](mailto:user1(expired)@easytoinspect.com)
- Inactive the user.

Now you can link the user1@easytoinspect.com to another account.

