


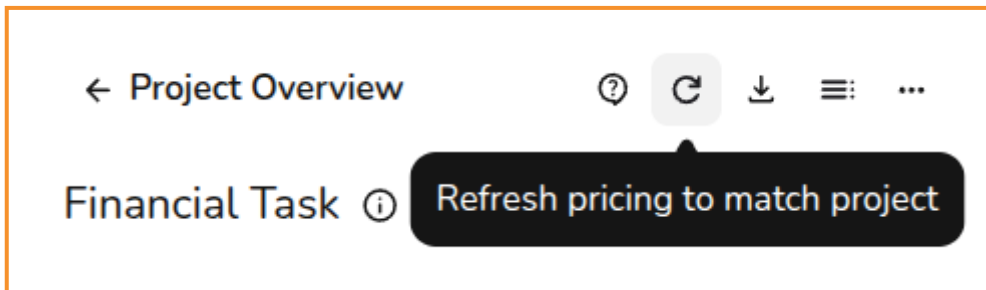
Customer proposal

- [Why does the quote page still show components I've removed from a project?](#)
- [Why are the incorrect tariffs being used in the proposal?](#)
- [How can I remove VAT from the cost on the proposal?](#)
- [My customer proposal isn't loading - why?](#)
- [Why is the battery page is showing as incomplete but I have a battery in the project?](#)
- [Why is the payback period on my Easy PV project different from an identical design produced on a different software?](#)
- [How do I attach my logo/branding to the customer proposal or Easy PV project report?](#)
- [The 3D image on the proposal has not updated after I made changes, how do I fix this?](#)
- [How do I hide/show line prices on the customer proposal quote page?](#)
- [Where do the numbers on the Financial Benefits page come from?](#)

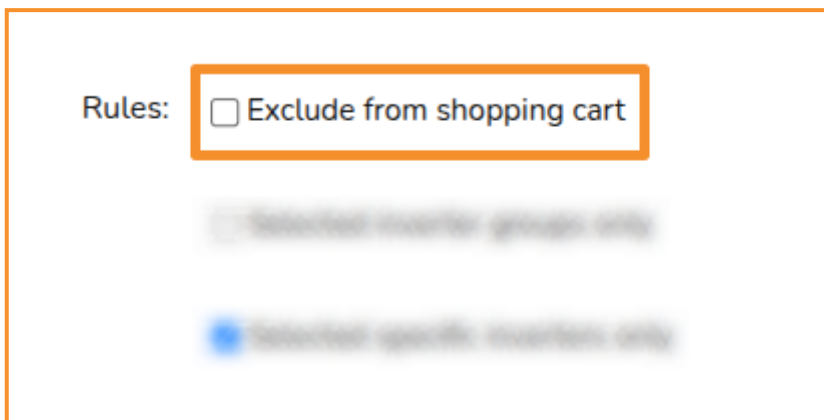
Why does the quote page still show components I've removed from a project?

If you changed the component *after* initially opening the financial task, you will need to **refresh the kit list**.

1. Open the financial task
2. Click the  icon in the top right
3. Click *Recalculate cost of goods*.



If the component is a battery and it's still not showing up, make sure you haven't selected the *Exclude from shopping cart* rule on the battery:



Why are the incorrect tariffs being used in the proposal?

If the tariffs in the proposal do not match the ones you've set up, it's likely you're using the wrong self-consumption method, as these use separate tariffs.

To fix this, follow these steps:

1. Navigate to the Financial task
2. Select *Financial inputs* in the top right
3. Under self-consumption, you can see the method selected and which tariffs are being used. Make sure you have both the right tariffs and method selected there:

Self consumption calculation

The proportion of electricity generated from a solar array that is used in a property can significantly affect financial returns. Easy PV has several different methods you can use to calculate self-consumption.

MCS
Use the value from the MCS performance task calculation (3820 kWh/year)

Easy PV
Use the value from Easy PV's consumption task (3172 kWh/year)

Enter value
Enter your own self-consumption rate

Import tariff: User Default flat tariff 24.50 p/kWh

Export tariff: User Export tariff 12.00 p/kWh

Indexing: To inflation

4. Save and exit

The tariffs you configure in the **Consumption task** will only be used for the **Easy PV self-consumption calculation**. It is not possible to use variable rate tariffs with the MCS or Enter value methods. Read more about that [here](#).

How can I remove VAT from the cost on the proposal?

You can do so by following these steps:

1. Navigate to the [Financial task](#)
2. Click the pen in the top right corner
3. Then under **Tax settings** select 'Yes' under 'Will the customer be able to reclaim the tax?'

Tax settings
Business customers can usually reclaim tax paid on an installation, but domestic customers typically can't reclaim tax.
Tax rates may be different for domestic and business customers.

What is the VAT rate for materials?

 %

What is the VAT rate for services?

 %

Will the customer be able to reclaim the tax?

 ▾

The cover page cost will then display excl. VAT. The quote total will still display inclusive of VAT.

My customer proposal isn't loading - why?

If your report isn't loading, it's likely because Easy PV is missing some information it needs to generate it.

Usually blank proposal are caused by issues with the [Performance task](#). Navigate to the task and make sure each step has been completed. If you go to the performance task and there are no errors, then we suggested contacting us on help@easy-pv.co.uk.

Why is the battery page is showing as incomplete but I have a battery in the project?

This page can only generate with the Easy PV or MCS self-consumption method selected in the [Financial task](#).

To fix this, follow these steps:

1. Navigate to the Financial task
2. Click the **Financial inputs** in the top right
3. Then make sure **MCS** or **Easy PV** is selected:

Self consumption calculation

The proportion of electricity generated from a solar array that is used in a property can significantly affect financial returns. Easy PV has several different methods you can use to calculate self-consumption.



MCS

Use the value from the MCS performance task calculation (1221 kWh/year)



Easy PV

Use the value from Easy PV's consumption task (1255 kWh/year)



Enter value

Enter your own self-consumption rate

This is because Easy PV needs to model how much of the consumption is coming from solar directly, from the battery or from the grid in order to generate that page. When you select 'Enter value', you are giving a flat self-consumption rate that includes all solar self-consumption, regardless of whether it's used to charge the battery before it's consumed directly.

Why is the payback period on my Easy PV project different from an identical design produced on a different software?

There is a variety of reasons the payback period could have come out differently. Even with identical kit and system cost, there are a few differences that can lead to significant differences in the payback period. The first things to check are:

- **Performance task:** Is the generation figure the same? If not, are the proposals using the same shading factors?
- **Consumption/Financial task:** Is the total consumption the same? Are the tariffs the same? Is the self-consumption calculation method the same?
- **Financial task:** Is the inflation, degradation and discount rate the same?

The most common reason for significant differences in payback time is that most other software calculates a standard payback period, whereas we use a *discounted* payback period. In short, a discount rate helps reflect the fact that £100 now is worth more than £100 earned in 10 years. Translating future earnings into terms of today's money has a negative impact on the total income and savings values and leads to a higher, but more accurate figure. The discount rate can be adjusted down to 0 in the financial settings of a project to make Easy PV also calculate a standard payback period.

How do I attach my logo/branding to the customer proposal or Easy PV project report?

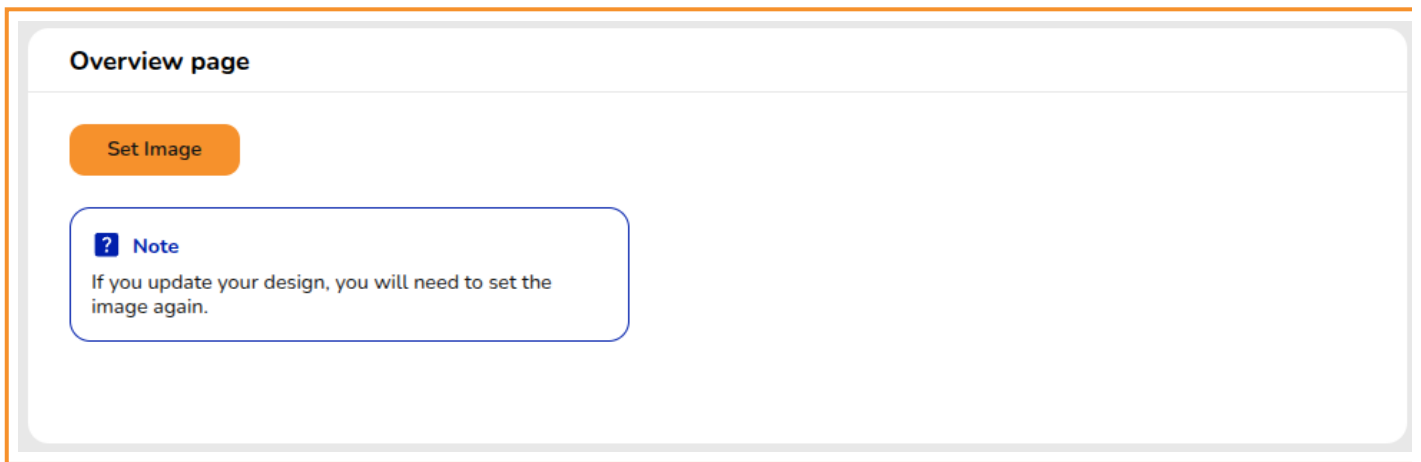
To attach your Logo to the Easy PV Project Report navigate to **My Account** in the top right of the Easy PV home page and then **Preferences**. Once in this menu, scroll down to the **Company Logo** section and click on the current logo image. You can then upload your logo.

Please note that the logo will only appear on the quote page of the customer proposal report.

Further customisation of the customer proposal is available with [Easy PV Pro](#), get in touch with us at help@easy-pv.co.uk if you're interested in a free trial!

The 3D image on the proposal has not updated after I made changes, how do I fix this?

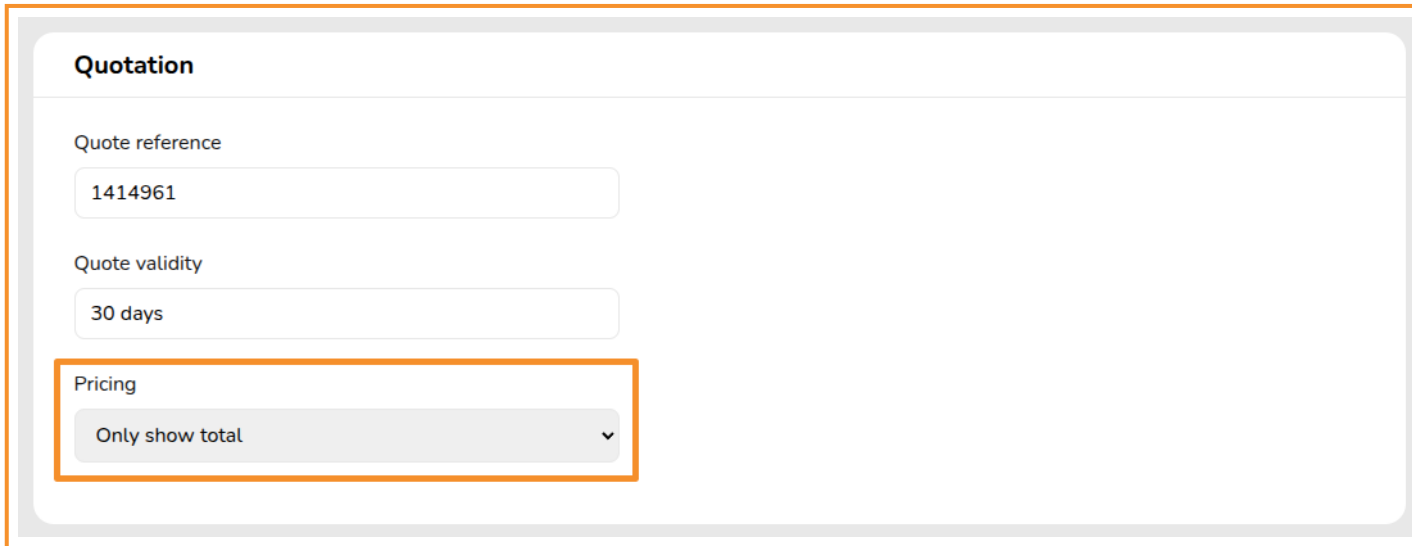
The overview image must be updated when changes are made to the design. To do this, navigate to the Customer proposal form (before clicking generate pdf) and scroll down to the **Overview page** section:



Select **Set Image** and then **Save**.

How do I hide/show line prices on the customer proposal quote page?

Select **Customer Proposal** from the **Tasks** drop-down menu.



The screenshot shows a web form titled "Quotation". It contains three input fields: "Quote reference" with the value "1414961", "Quote validity" with the value "30 days", and a "Pricing" dropdown menu. The dropdown menu is currently set to "Only show total" and is highlighted with an orange border. The dropdown arrow is visible on the right side of the menu.

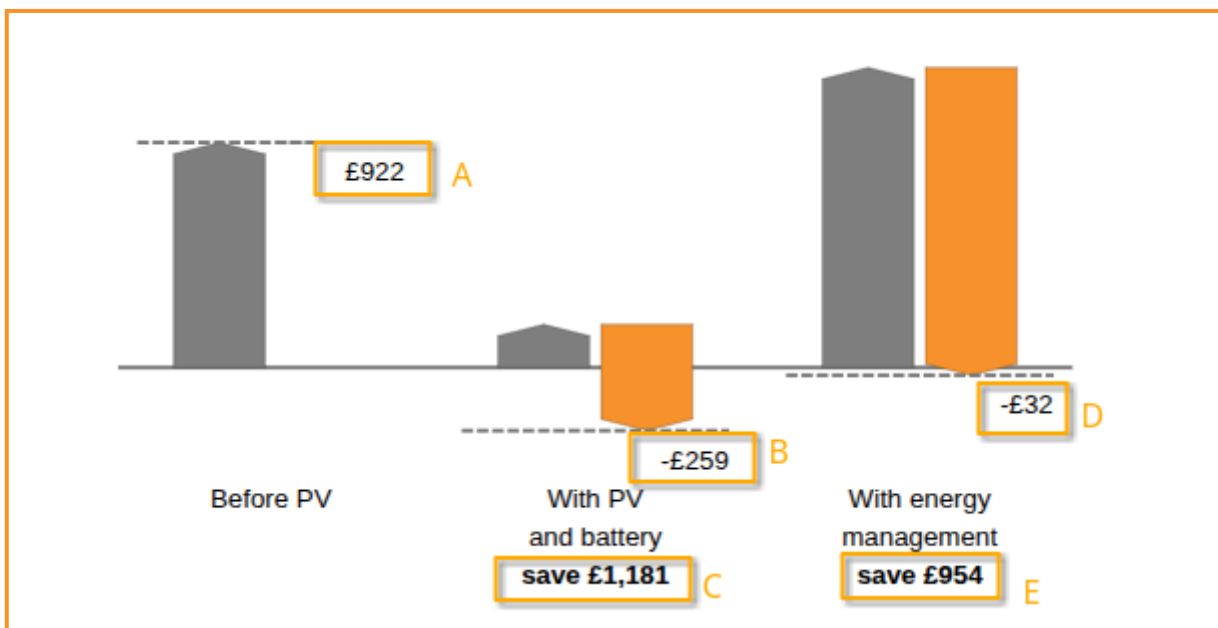
In the section titled **Quotation** you can change the pricing to:

- Show line items,
- Show equipment and services subtotals,
- Only show total.

Where do the numbers on the Financial Benefits page come from?

The Financial Benefits calculated based on the tariffs that you input. You can take a look at how to create and manage your tariffs [here](#).

Here is a breakdown of the figures on the graph given on the Financial Benefits page of the Customer Proposal.



A - The total cost per year before the PV system.

B - The cost after PV and battery including savings from exporting (In this case, a negative number because they will actually be making a profit).

C - The difference between the original cost before PV & battery and after.

D - The export profit with energy management (overnight charging).

E - The difference between how much you pay for energy before solar and what you 'pay' after energy management.