

Pro: Online Proposal

Online proposals allow you to send your customers an interactive web link instead of (or alongside) a traditional PDF quote. These proposals are fully responsive, meaning they look great and function perfectly whether your customer is viewing them on a desktop computer or scrolling on a mobile phone.

Previewing the online proposal

You can preview your online proposal by following these steps:

1. Open your Project.
 2. Navigate to the **Customer Proposal** task.
 3. Click **View & share Customer Proposal**.
 4. Select **Preview online proposal**.
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Sharing the proposal with your customer

You can share your online proposal with your customer by following these steps:

1. Open your Project.
2. Navigate to the **Customer Proposal** task.
3. Click **View & share Customer Proposal**.
4. Select **Share with customer**.
5. Use the orange toggles to select what you want to share with the customer. You can choose any combination of **PDF proposal**, **Online proposal** and **Ask them to e-sign**.
6. Use the orange ticks to select how you'd like to share these.
7. Click **Confirm**.
8. If you have selected the **Email from Easy PV** option, you will be taken to the Send email page. Please find further guidance [here](#).
9. If you have selected the **Ask them to e-sign** option, the proposal(s) will contain a link to sign the document. The customer only needs to sign once.
10. After you share the online proposal, a version 1 will be created. Later you will be able to go back and see Previous versions.

Share with customer

What the customer gets

PDF proposal

A file, frozen as you share it.

BETA Online proposal

A page presenting the same document with added interactivity.

Ask them to e-sign

Attaches a signing link to whatever goes out above.

How it goes out

☒ Email from Easy PV

Opens the composer with the PDF and the links in place.

☐ Copy links to clipboard

Online proposal and signing link.

☐ Download the PDF

The same file the customer receives.

☒ Save to project files

Keeps a copy against the project.

⚠ This creates version v1

The draft is frozen as v1 whichever method you pick, and the old online proposal links are marked superseded.

Cancel

Confirm

This feature is currently in **Beta** and will evolve as we make improvements. We would love to hear your thoughts. Please share your feedback with our support team to help shape these updates!

Contact Support: If you've got further questions, get in touch with our support team at **help@easy-pv.co.uk** (UK) or **help@easy-pv.ie** (IE). *If you are experiencing a bug, to help us look into your issue faster, please include the email address of your account, the name of the project and screenshots of any unexpected behaviour.*

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