

Why customer proposals matter in solar PV

Designing and selling solar PV systems isn't just about technical accuracy. It's about helping customers understand what they're investing in and how their choices affect long-term savings. A well-structured proposal document can make the difference between confusion and confidence.

Easy PV's customer proposal is designed with this principle in mind: turning complex system data into clear, practical information that supports both installers and homeowners. More importantly, it reflects a wider truth in our industry — that compliance, transparency, and education are as critical as the technology itself.

Clarity without oversimplification

- **Supporting MCS compliance:** The proposal is structured to help installers ensure they meet the requirements of the Microgeneration Certification Scheme (MCS). By including performance calculations, shading methodology, and clear disclaimers, it supports installers in delivering proposals that align with industry standards.
- **Context-aware content:** The proposal adapts to the system being designed — PV-only or PV plus battery storage — so customers see the information that matters for them.
- **Plain language explanations:** Technical elements such as orientation, shading, inverter capacity, and storage behaviour are explained with concise notes and visuals.
- **Clear figures:** Forecasts for generation, expected bills, and payback are presented in a way customers can relate directly to their household costs.

This balance of compliance support, clarity, and detail is what builds trust. Customers don't need every engineering calculation, but they do need enough context to feel confident in their decision.

Transparent forecasting

The proposal makes it straightforward to compare the tariff a customer is currently on with a proposed new tariff, showing how the right choice can boost savings when paired with smart energy management settings.

It also gives installers a way to explain how customers can maximise system benefits — for example, by modelling charging and discharging schedules for batteries (see our article on [maximising ROI through energy management](#)).

These figures are **forecasts, not guarantees**. Tariffs change: time-of-use rates are updated, new products appear, and export rates can fall. Easy PV provides the tools to configure tariffs accurately at the design stage, but it's the installer's responsibility to set expectations clearly and explain that ongoing tariff reviews are essential to sustaining ROI.

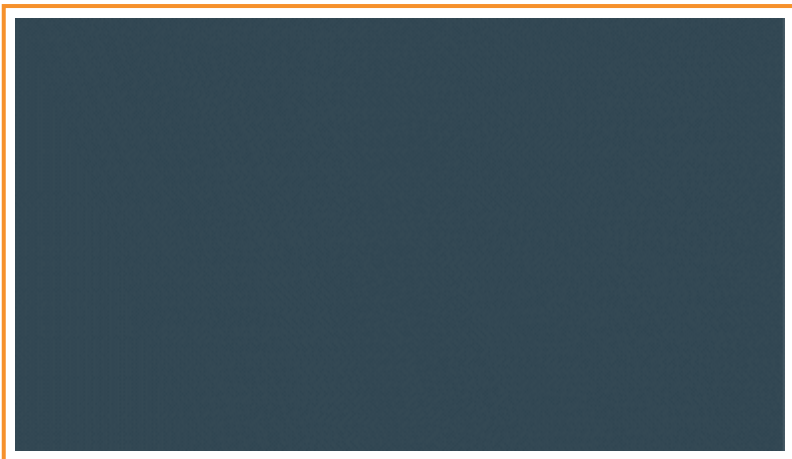
Customer education that sticks

- **Link settings to bills:** When battery storage is included, the proposal explains how off-peak charging and peak-time discharging work in pounds and pence, not just kWh. See [Understanding energy management options](#) for more context.
- **Show consumption interaction:** The proposal connects household demand patterns to generation and storage behaviour, so customers see why their usage profile matters even with PV-only systems.
- **Confidence post-install:** Clear expectations reduce “what did I buy?” queries and help customers understand what to check if bills don't match the forecast.

Education is not an add-on; it's central to helping customers realise the forecasted savings and payback period.

Payment and financing options built in

A proposal is most effective when it connects technical design to financial reality. Easy PV's new [payment and financing features](#) allow installers to include clear options for how customers can pay for their system. Whether it's upfront, staged payments, or financing plans, customers see the investment alongside the savings forecast. This makes the proposal a complete package: design, financial outcomes, and payment pathways all in one place.



Pro features that streamline sales

With [Easy PV Pro](#), you'll gain access to enhanced proposal features that make the sales process smoother and more professional:

- **Custom branding** – Produce documents that reflect your company identity while maintaining Easy PV's clear structure.
- **Emailing and e-signing** – Send proposals directly and collect signatures without leaving the workflow, speeding up approvals and reducing friction.
- **Project document management** – Keep proposals, revisions, and related files together, so your team can retrieve the latest version and track changes easily.

These features make proposals easier to issue, approve, and manage which in turn reduces delays between design, acceptance, and scheduling.

Final thoughts

Easy PV's customer proposal document is about clarity, transparency, and practicality. By combining system design outputs with tariff comparisons, Pro features, financing options and MCS compliance, it helps installers deliver proposals that customers can trust and act on. That's how projects move from technical designs to real-world outcomes that benefit both homeowners and businesses.

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Revision #12

Created 25 November 2025 15:59:43 by Matt Agnes

Updated 29 April 2026 08:38:29 by Matt Agnes