

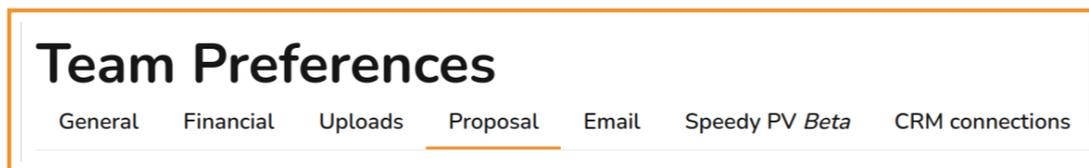
Customer Proposal Customisation

With Easy PV Pro, you are able to customise the proposal document that you send to your customers. You have the option to:

- Add a custom cover page
- Customise colours to match your brand
- Add an 'About us' section to the contents page
- Configure a branded page footer to appear on all pages of the proposal document with your logo and company information
- Add your terms and conditions
- Add other important information about your services and the scope of work. This can be overwritten on a project-by-project basis.

If you want further customisation of the proposal or want us to create a document entirely to your own specification, please contact us about our **Enterprise package** on help@easy-pv.co.uk.

To make these customisations, navigate to **Pro account setting** > **Proposal**. There will also be an **Uploads** section in your Pro account settings where you can manage all the images you upload.



Colours

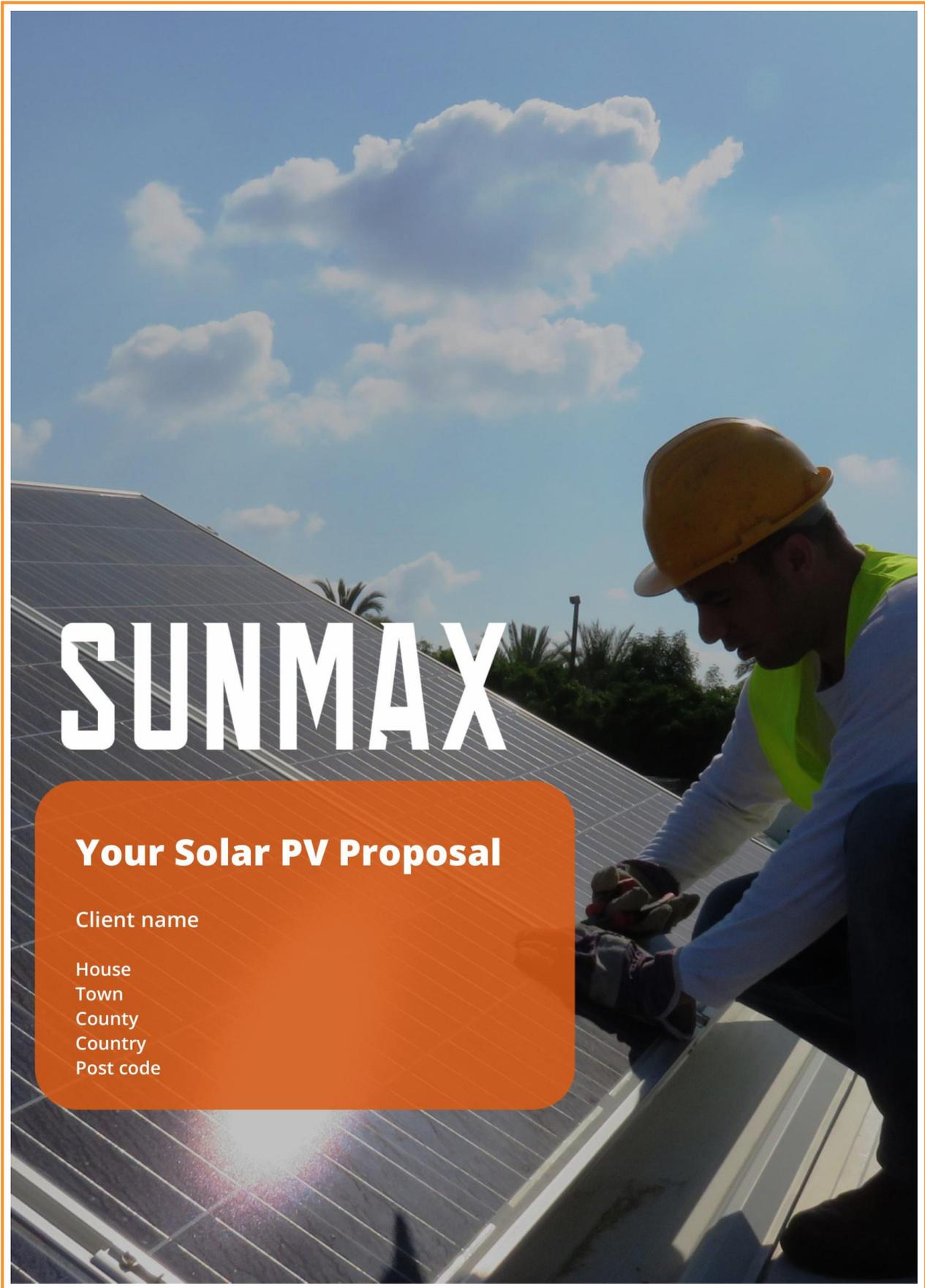
Select the colour you would like headers to appear in the proposal document.

Cover page

Select whether you would like to include a custom cover page.

If you don't already have a preferred way of making a cover page, you might find [Canva](#) useful. We have created a [template](#) with some additional instructions that you can use to create your own cover page design in Canva. When you are finished, click Share, then download, change the file type to PNG or JPG and download.

Here is an example of a custom cover page for our fictional SUNMAX company:



Once you have your custom cover page, either add it in the **Uploads** tab or in the cover page section click **Select from uploaded images > Add images**. After uploading you will be able to select your cover page.

If you are having trouble selecting your image from your uploads, please contact support on help@easy-pv.co.uk.

Footer

In your custom footer you can input a phone number, address and website. You can also select the footer background and text colour and upload a logo.

Contents page

In this section you can add a custom cover letter and add an 'About us' section with a custom image. The 'About us' section should be a short description, make sure it does not overflow onto the next page of the proposal.

Here is an example of the footer and contents page customisations:

Customisable header colours

Your Solar Proposal

Custom cover letter

Thanks for choosing Midsummer Installations to provide a design for a solar PV system at House, Town, County, Country. We're delighted to supply the attached proposal for a 5.1 kW solar array.

We expect your system to generate 4,976 kWh of clean electricity every year, and save 904 kg CO₂ of carbon.

There are full details on the following pages. We hope you enjoy the read!

Kind regards,

Daisy Kernick

Midsummer Installations

Contents

Overview	3
Performance	5
Battery Storage	6
Consumption	7
Financial	8
Environment	9
Quote	10
Terms and conditions	11
Scope of Works	12

This proposal is for:

Client name

House
Town
County
Country
Post code

Prepared October 23, 2024
Valid for 30 days

 5.1 kW PV System

 **£4,895 inc VAT:** Expected payback 3 years. Estimated first year savings £1,149

 **4,976 kWh/yr:** Annual CO₂ savings of 904 kg

About us section

About us

Sunmax is a leading solar installation company in East Anglia, specializing in residential and commercial solar energy solutions. We offer comprehensive services, including design, installation, and maintenance of solar PV systems. Sunmax is committed to sustainability and helping our customers reduce energy costs.

SUNMAX

Custom footer

SUNMAX

Sunnydale Industrial Park, Suntown, SU1 1NY | sunmax.com | 2 of 14

Terms and conditions

Here you can input your terms and conditions.

Scope of works

Enter your usual scope of works here.

The terms and conditions, scope of works and cover letter can all be customised on a per project basis.

Ensure you are not including any special characters or your text will not format correctly when you generate the customer proposal PDF.

Revision #4

Created 10 October 2024 10:49:48 by Daisy Kernick

Updated 23 October 2024 17:25:28 by Daisy Kernick