

Financial task

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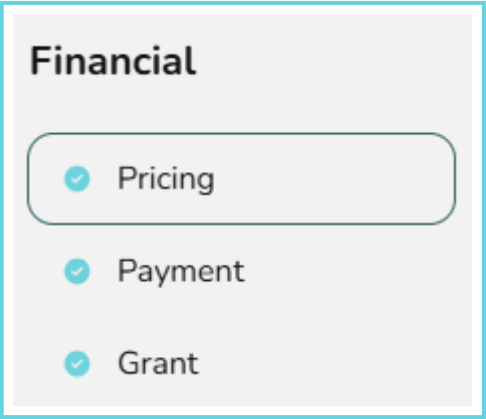
Using the financial task

The **Financial Task** in Heatpunk allows you to manage project pricing, configure payment options, and calculate running costs for a heat pump installation.

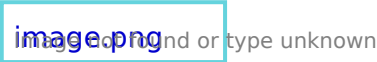
Getting started with the Financial Task

You can access the Financial task via the **'Tasks' drop-down menu** or from the **task list** to the left on the project overview page.

When the Financial task first opens, you'll be shown a popup that lets you **configure the settings** you want to use for the quote and projections. It will open on 'Pricing' and then you can use the left hand navigation to choose the settings you want to edit:



If you'd like to change these values at a later stage, click **Financial inputs** in the top right or edit specific options directly from the right-hand sidebar.



Financial task inputs

Expand each section below for more details on each setting.

Pricing

In this section you can configure pricing options, including a quick way to add on the UK Boiler Upgrade Scheme voucher grant. You can also configure the VAT settings for your project.

Pro subscription: If you have set up automatic pricing for your team, optional line items will be displayed here. You can choose which items to include and these will be added to the quote.

Payment

In this section you can configure how the customer will pay for the system, with the option to either pay in full or with finance. Any discounts or grants are configured in later sections but will be automatically factored in.

- Select from your pre-configured payment options for this project or create new ones. You can set default values for this section in your financial settings.
- If you'd like to amend an existing one for this project, you can just duplicate to project and edit any details or navigate to your financial settings by click Edit option at the top to edit the default option.

Learn more: [Setting up payment options.](#)

Note: A pay in full option is required on all projects, even if the customer intends to pay with finance.

Grant

If the project is eligible for a grant that will pay for some or all of the cost of the system, you can add it here.

Set the description, the value and whether this is claimed before or after the installation.

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Payment options

A payment option is a method by which the customer can pay for a project. Payment options can be created, viewed and edited in the [financial task](#). You can also set up payments in your account financial settings. If you are a member of a Pro team, this will be set by your team admin in the Pro account financial settings.

Creating a new payment option

New payment options can be created within projects through the [financial task](#) on the **Payment** tab or by navigating to the financial settings in your user or pro team settings. Click **+ New payment option** and follow the steps outlined below.

1. Overview

Name: Input the name you'd like to appear on the proposal for this payment option.

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Scope: The option will only appear if you're creating a payment option from within a project. Select whether you'd like this option to appear for just this project or to be available on future projects. If you are in a pro team, you will also see the option to make it available for you team.

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Payment type: Select between **Pay in full** or **Finance** depending on what payment option you need. For both options you can set up multiple payment stages and for finance options you can model paying off some or all of the cost of the system with a loan. This can be changed at any point.

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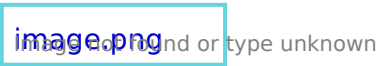
Default checkbox: This option will only appear if your scope is set to **User** or **Team**. If you check this box, this payment option will be selected on all future projects.

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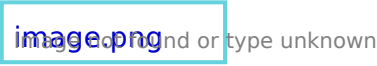
2. Payment

In this section you can configure the payment stages for the quote. This is optional if you selected Finance as the payment type.

Payment format: set whether you'd like payments to be defined as percentages or as constant values.



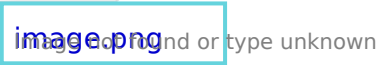
Payment stages: add rows to define additional payment stages, set the name of the stage to appear on the quote, the amount (% or £) and when the stage will be payable. If Finance was selected, the final (or only) stage will be from 'Finance Payments'.



3. Finance

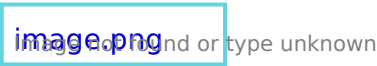
Here you can configure the details of the finance payments. This section will not appear if you've selected **Pay in full**.

Finance provider: This is the organisation or lender that provides finance or a lease for a project. Select from the drop down menu from your pre-configured finance providers or select **+ New provider**.

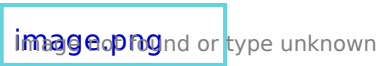


When creating a new provider you will need to input the name of the provider, the scope (if you're creating within a project) and an optional description.

Repayment: set the repayment term, the repayment frequency and the repayment type. For most domestic installations, the repayment type will be fixed.

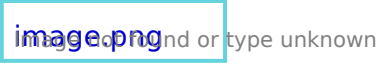


Interest: set the loan interest rate and whether you want the interest to compound monthly or annually.



4. Disclaimer

Set whether you'd like to include a custom disclaimer - this will appear next to the financial calculations for this payment option.



Editing existing payment options

If you would like to edit existing payment options, this can be done within a project or in your financial settings. All details listed above can be edited on your payment options except the scope. To change the scope of a payment option, duplicate the option within a project and set the new scope from the overview tab.

Financial settings

Open your user or team settings, navigate to the 'Financial' tab and scroll down to **Payment options and providers**. Here you can see all your payment options and providers and create new ones.

On each payment option, you'll have the following options:



- **Edit**

Click the pencil to edit existing options.

- Click the **three dots** to view the following options:

- **Duplicate**

Copy and edit an existing payment option or provider if you need to make small changes to an existing option

- **Delete**

This will delete the payment option or provider and cannot be undone. Previous projects using these options will be unchanged

- **Hide**

This will no longer show as a payment option or provider but will still show in this menu. It can be un-hidden at anytime from your financial settings

Within a project

In a project you can select the payment methods you'd like to make available to the customer. You can create a new payment method for your current project (or any future project by setting the scope to User or Team) by clicking **+ New Payment Option**. Update your existing methods in your settings with the **Edit** option at the top.

Note: project level payment options can be edited, deleted and duplicated but **user** and **team** level options **cannot be edited or deleted** from within a project. Navigate to your financial settings to edit user or team level payment options or duplicate to make a project level copy.

Still Need Help?

Contact Support: If you've got further questions, get in touch with our support team at **help@heatpunk.co.uk** (UK) or **help@heatpunk.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.*