

Getting started with Pro

- [Getting started with Heatpunk Pro](#)
- [Pro: Create and manage your components](#)
- [Pro: Team Management](#)
- [Pro: Share projects and components](#)
- [Pro: Company Details and Subscription Settings](#)
- [Pro: Email credentials](#)
- [Pro: Customer Proposal Customisation](#)
- [Pro: Automatic pricing](#)

Getting started with Heatpunk Pro

Our Pro tier unlocks team collaboration and access to features that can save you time and impress your customers with a professional journey through their quote and installation.

What do I get with Pro?

We run [weekly training sessions](#) (these are held online and completely free) which cover all the extra features that you get with Pro. The cost is £35 / month (plus VAT) per user. Below is a summary of everything included in Heatpunk Pro.

- [Upload floor plan](#)
- [Custom components](#)
- [Project and component sharing](#)
- Project status tracking
- [Customised customer proposal](#)
- [E-signing](#)
- [Document storage](#)
- [Emailing](#)
- [Survey and installation record](#)
- Additional forms and reports
- [Connect Direct API](#)
- [CRM connections](#)
- [Shrunk Punk](#) (for additional cost)

How do I upgrade?

To upgrade to Pro, log into the account you would like to be the [Owner](#). In the top right, you will see the option to **Upgrade to Pro**:

Click this and navigate through each step:

1. Add team members and set their [role type](#)
2. [Connect to Midsummer](#) so your pricing correctly applies for all team members
3. Fill in billing details

4. Pay via GoCardless instant bank payment

Some banks do not support instant payments so if you're having trouble setting up the payment, please get in touch so we can do this manually.

Configuring team settings

Once you've upgraded, you can then configure your team settings. You can read about the options you have below:

- General
 - [Team management](#)
 - [Billing and subscription details](#)
 - [Setting up sharing permissions](#)
 - [Automatic pricing calculator](#)
 - [Documents](#)
 - Upload shared documents that can get attached to emails
 - Upload images used in proposal customisation
 - [Customer proposal](#)
 - [Email settings](#)
 - [Shrunk Punk](#)
-

Still Need Help? / Want to know more?

- **Related FAQs:** Check out our [Pro and Enterprise FAQs](#) for answers to common questions
- **Further guides:** Take a look at our [Pro help guides](#)
- **Live training:** [Book onto a live demo session](#) to see these features in action

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.*

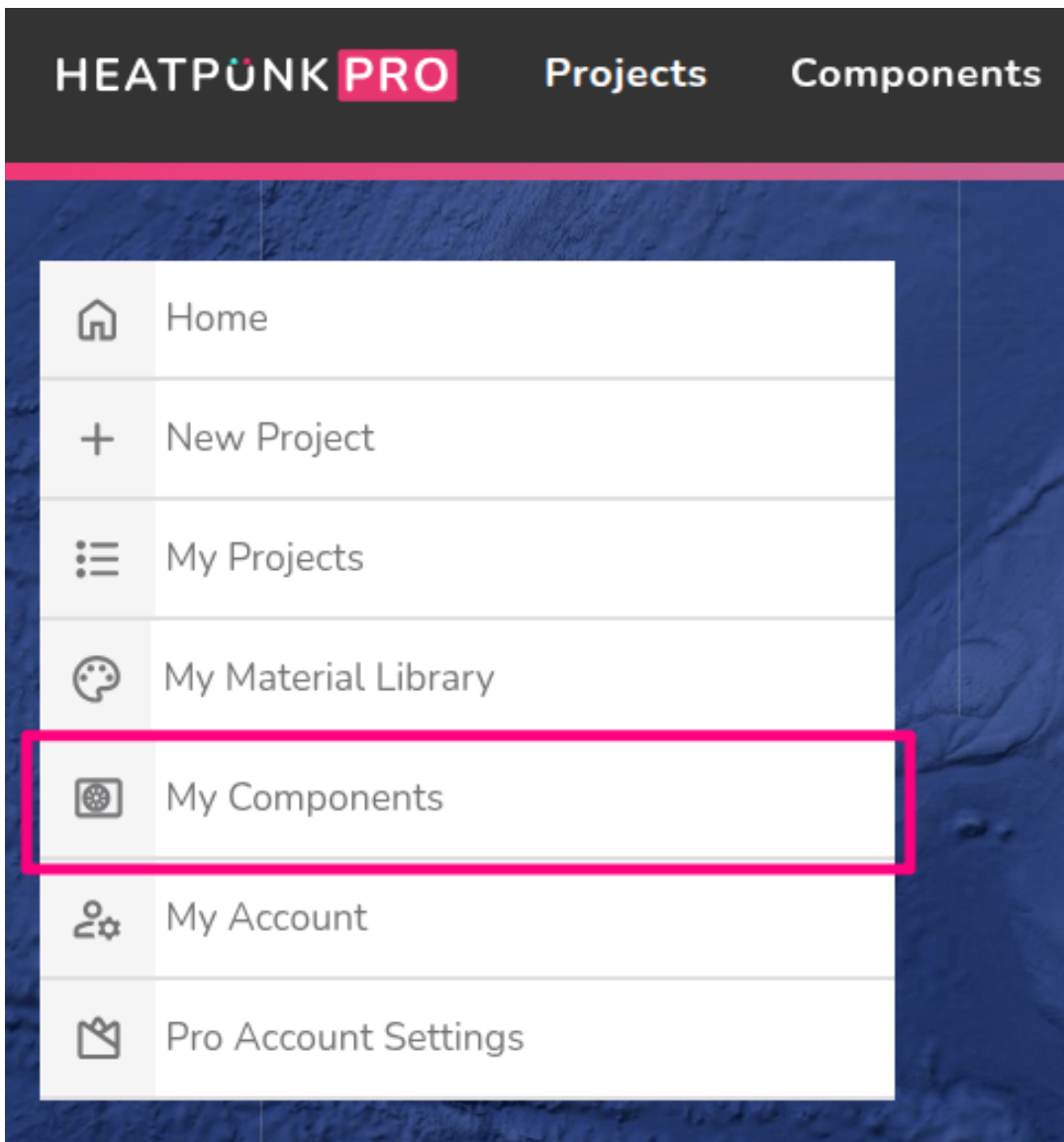
Pro: Create and manage your components

In this guide, we will detail how to create custom components on Heatpunk.

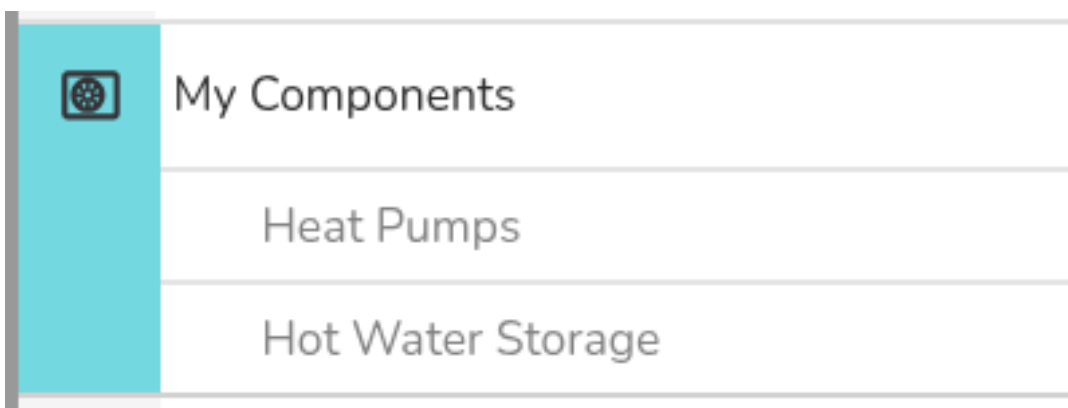
For most components you will need to add, there is a set of technical information that needs to be entered so that Heatpunk can conduct necessary performance calculations. This information is available from the manufacturer's technical datasheet for that specific product.

If you require assistance reading technical information from a datasheet, please contact the manufacturer directly. This is not something we can provide significant support with since these will not be products Midsummer sells.

You can access the your components from the Heatpunk home page under 'My Components'.



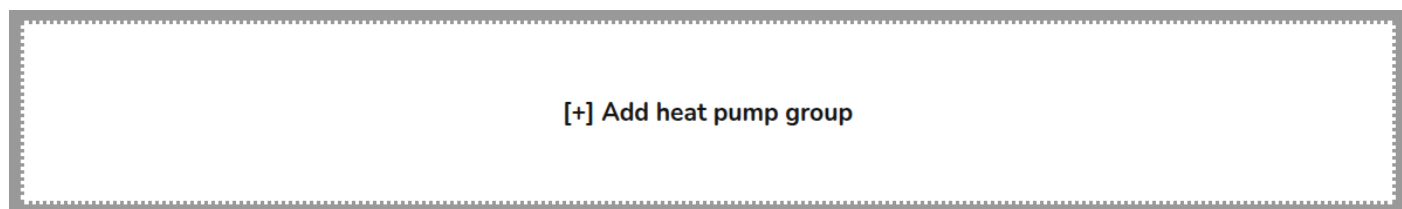
Select from the menu on the left which component you would like to add from the available options.



Heat pump

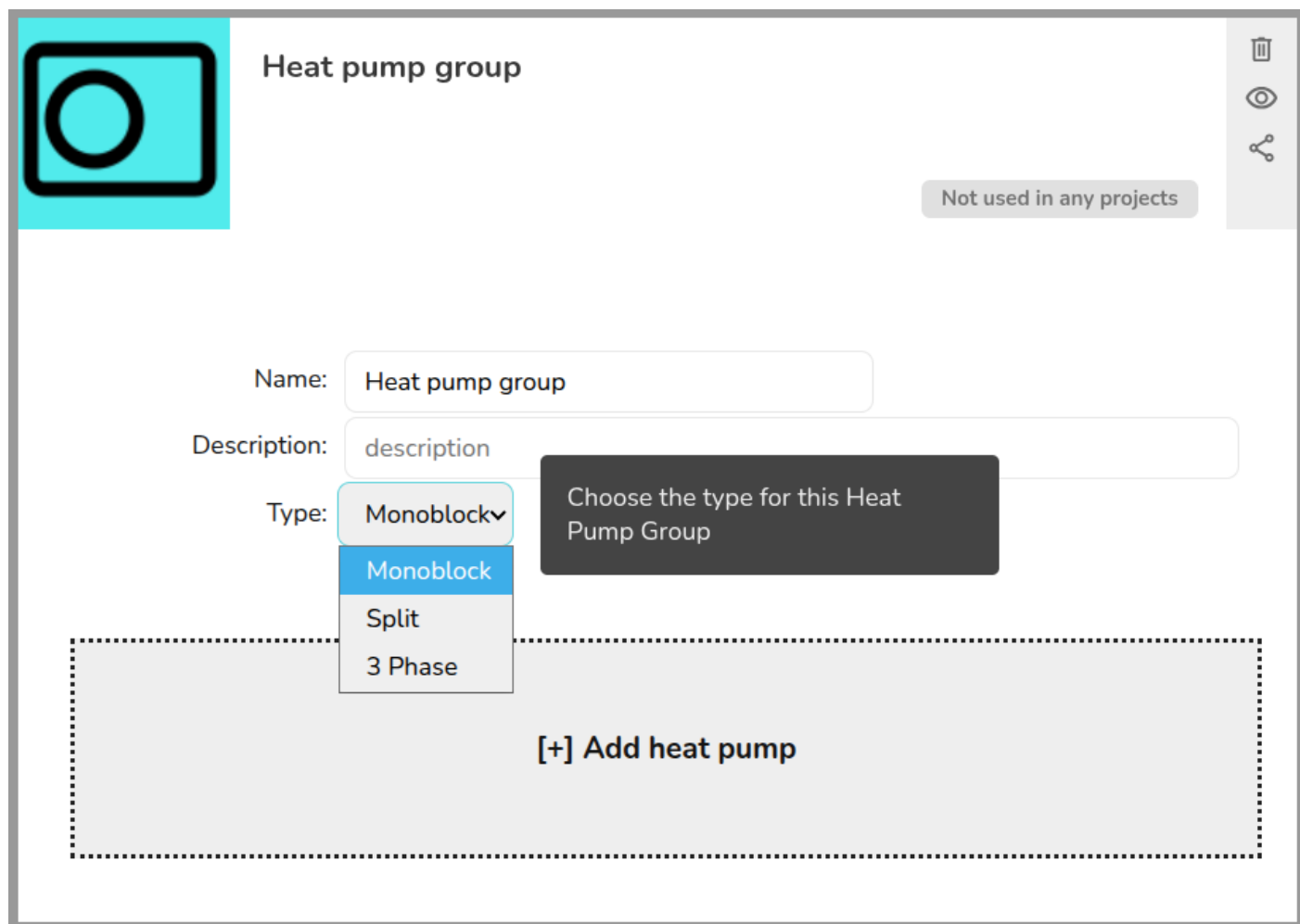
Creating manufacturer

When adding any custom heat pump in Heatpunk you first need to add a custom manufacturer category which allows you to organise your custom components. The components added will be categorised by their manufacturer when it comes to select them in a project.



Inputting information from datasheet

After inputting the name for the manufacturer, re-open your custom manufacturer and you will see additional options to add a heat pump.



You will then need to input the technical information found in the datasheet for the heat pump.

New heat pump details

Name:

name

Description:

description

Make:

make

Model:

model

Nominal Output

Nominal output

kW

Sound Power Level

Sound power level

dB

ENA system reference

ENA system reference

Power Factor:

1

Price:

price

Enter the Seasonal Coefficient
of Performance for given flow
temperatures:

scop

at

temperi

°

Enter the output powers at
different Outside Design
Temperatures (ODT) and
Flow Temperatures:

	ODT	ODT	ODT
Flow temp	output power	output power	output power
Flow temp	output power	output power	output power
Flow temp	output power	output power	output power

Add ODT

Add flow temperature

Remove ODT

Remove flow temperature

Below is a list of each value required to add a custom heat pump alongside some details for each.

Technical info	Details
----------------	---------

Nominal output	Units: kW
Sound power level	- Units: dB - This should be measured in accordance with EN12102
ENA system reference	This can be found on the ENA Heat Pump Register
Power factor	This will pre-populate as 1. You should edit as necessary

The heat pump will auto-save once all the required fields are completed. It will not save before this.

You should also add SCOPs and Output Powers. Without this information Heatpunk can not perform the required calculations.

SCOPs

You should input the MCS SCOP at a range of flow temperatures (usually 35-55°C). This information can be found on the [MCS Product Directory](#).

You should add each SCOP at a given temperature individually. Once you have added one, the input box will appear to add the next. A completed example is shown below.

Enter the Seasonal Coefficient
of Performance for given flow
temperatures:

4.57	at	35	°C
4.54	at	36	°C
4.52	at	37	°C
4.5	at	38	°C
4.48	at	39	°C
4.46	at	40	°C
4.44	at	41	°C
4.42	at	42	°C
4.39	at	43	°C
4.37	at	44	°C
4.35	at	45	°C
4.28	at	46	°C
4.21	at	47	°C
4.14	at	48	°C
4.07	at	49	°C
4	at	50	°C
3.93	at	51	°C
3.86	at	52	°C
3.79	at	53	°C
3.72	at	54	°C
3.65	at	55	°C
scop	at	temper.	°

Output Powers

You should add the output power (kW) at a range of outside design temperatures (ODTs) and flow temperatures. You should be able to get this information from the manufacturer.

The more information the better but you should aim for at least -7°C to 2°C ODT and 35 to 55°C flow temperature. A minimum of three data points is needed on each axis of the graph. You can add and remove rows and columns as necessary using the buttons below the table.

Outputs including the defrost cycle are preferred.

A completed example is shown below, however, please note not every manufacturer is able to provide the level of data shown here.

Enter the output powers at different Outside Design Temperatures (ODT) and Flow Temperatures:

	-7	-6	-5	-4	-3	-2	-1	0	1	2
35	12.7	12.63	12.55	12.52	12.5	12.47	12.64	12.8	12.8	12.8
40	12.59	12.58	12.56	12.59	12.61	12.64	12.75	12.85	13	13.14
45	12.5	12.53	12.56	12.59	12.63	12.66	12.92	13.17	13.14	13.1
50	12.23	12.26	12.28	12.45	12.61	12.78	12.97	13.15	13.1	13.05
55	12.4	12.13	11.85	11.99	12.14	12.28	12.6	12.91	13.01	13.1

Add ODT

Add flow temperature

Remove ODT

Remove flow temperature

Additional details

You can add a number of additional details as necessary:

- You can name the heat pump you have created and add a short description. Both the name and description will show when choosing the heat pump as well as in your final customer proposal.
- You can add a photo of the heat pump. As with the name and description, this will show when choosing the heat pump as well as in the final customer proposal. To edit the image of the custom manufacturer or component, click on the default image and either upload from your files or paste a copied image.
- You can add a make and model of the heat pump.
- You can add a price for the heat pump. This will be the price that is used in your Heatpunk project.

Once you have added a heat pump successfully - you'll be able to select it in the list of heat pumps when creating a new project.

Hot water storage

Creating manufacturer

When adding any custom hot water storage unit in Heatpunk you first need to add a custom manufacturer category which allows you to organise your custom components. You should specify the type of storage unit you are adding from the drop-down menu. If you would like to add additional storage units that are of a different type, then you must create a new manufacturer category.

[+] Add hot water storage group



Custom manufacturer

Not used in any projects

Name:

Custom manufacturer

Description:

description

Type:

Standard

Standard

Pre-plumbed

Slimline

Slimline Pre-plumbed

Horizontal

Stacked

Hot water storage

Inputting information from datasheet

After inputting the name for the manufacturer and type of storage unit, re-open your custom manufacturer and you will see additional options to add hot water storage.

You will then need to input the technical information found in the datasheet for the storage unit.

New hot water storage details

Name:

name

Description:

description

Make:

make

Model:

model

Nominal Capacity

Nominal capacity

ℓ

Weight (empty):

weightEmpty

kg

Weight (full):

weightFull

kg

Height:

storageHeight

mm

Width:

storageWidth

mm

Length:

storageLength

mm

Standing Heat Loss:

standingHeatLoss

kWh/24h

Coil size:

coilSize

m²

Coil rating:

coilRating

kW

Immersion Heater:

3

kW

ERP Band:

B

▼

Price:

price

Admin

Wholesale ID:

wholesaleID

Component Priority:

priority

Access:

user

▼

Rules:

☐ Selected specific heat pump groups only

Below is a list of each value required to add a custom storage unit alongside some details for each.

Technical info	Details
Nominal output	Units: L
Weight (empty)	Units: kg
Weight (full)	Units: kg
Height	Units: mm
Width	- Units: mm - Enter diameter if cylindrical.
Length	- Units: mm - Enter diameter if cylindrical.
Standing heat loss	Units: kWh/24h

You should also add the following technical data, if available:

- Coil size (m²)
- Coil rating (kW)
- Immersion heater rating (kW)
- ERP band - this will autopopulate as B. You should edit as necessary.

Additional details

You can add a number of additional details as necessary:

- You can name the hot water storage unit you have created and add a short description. Both the name and description will show when choosing the storage unit as well as in your final customer proposal.
- You can add a photo of the storage unit. As with the name and description, this will show when choosing the storage unit as well as in the final customer proposal. To edit the image of the custom manufacturer or component, click on the default image and either upload from your files or paste a copied image.
- You can add a make and model of the storage unit.

- You can add a price for the storage unit. This will be the price that is used in your Heatpunk project.

Once you have added a hot water storage unit successfully - you'll be able to select it in the list of storage units when creating a new project.

Still Need Help? / Want to know more?

- **Further guides:** Take a look at [our Pro guides](#)
- **Live training:** [Book onto a live demo session](#) to see this feature in action

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.*

Pro: Team Management

This guide applies to **pro** versions of Heatpunk

Team management allows you to have control over who is on your Heatpunk Team and the permissions (role type) they have.

Managing your team

You can manage your team settings in **Pro Account Settings > General**. The team owner and any users with the admin role type can add and remove users, as well as change their role type.

Team Name

Midsummer Heatpunk Team Edit

First Name	Last Name	Email Address	Role Type
Tianyi	Yuan	tianyi.yuan@midsun	Owner
test	test (you)	daisy.kernick+pro4@	Admin 
			
			Admin
			Standard

+ Add User

Role types

With Heatpunk pro, different members of the team can have different levels of access. The roles available are:

- **Admin:** role includes the ability to view and manage Pro team settings.
- **Owner:** this is the user who set up the pro team and this role cannot be selected or changed. They have same permissions as admin but cannot be removed from the team, so make sure this is under an email address you can access even if the owner was to leave the company.
- **Standard:** can access all pro features within projects, but cannot view or edit the pro account settings.

Adding or removing users

To **add users**, you'll need the individual's name and email address (they do not need an existing Heatpunk account). You can then choose the user's role. This role can be changed at anytime.

+ Add User

Standard 



Cancel

Save

The cost for adding a new user will be proportional to how much time is left until your next charge date and subsequent direct debits will be automatically updated.

To **remove a user**, click on the icon beside their details. This will disable their account and remove them from the subscription. The owner account cannot be removed so ensure it is under a company email address.

Editing users

User names or email addresses cannot be edited here. This can only be done while logged into the relevant account. If you've made a typo when adding a new user to your team, get in touch with the [support team](#).

See here for information on [sharing projects and components](#) between team members.

Still Need Help? / Want to know more?

- **Related FAQs:** Check out our [Pro FAQs](#) for answers to common questions
- **Further guides:** Take a look at our [Pro guides](#)
- **Live training:** [Book onto a live demo session](#) to see this feature in action

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.*

Pro: Share projects and components

With Heatpunk pro you're able to collaborate with your team by sharing projects and components. See below how you can configure your sharing settings.

Understanding sharing options

You will have the following options when sharing projects and components in Heatpunk:

- **View:** Users will be able to view projects or use the component, but not edit it.
- **Edit:** Users will be able to view and make changes to the project or component.
- **Manage:** Users will be able view, edit and permanently delete the project or component, transfer ownership of the project and change or remove other users or team's access to the project or component

Note: the **Owner** of a project will get email notifications when a document from that project is e-signed. The owner will also have Manage permission by default.

Default sharing

Each user in a Pro team can configure default sharing settings for the projects and components they create. Navigate to **My account > Preferences > General** and then **Default sharing**.

In this section, simply select which sharing permissions you would like to be granted automatically when creating a project or component.

Projects

SUNMAX

View Edit Manage

Components

SUNMAX

View Edit Manage

Default sharing

When you create new projects or components you can choose if they should be automatically shared with your colleagues. Click to toggle the rights you want to give the people you can share with.

View lets people open it, **Edit** also lets them make changes, and **Manage** gives full control — including sharing, deleting and transferring ownership.

Note: This will only apply to *new* projects and components. If you would like to share old projects or components, see below for instructions on manual sharing.

Manual sharing

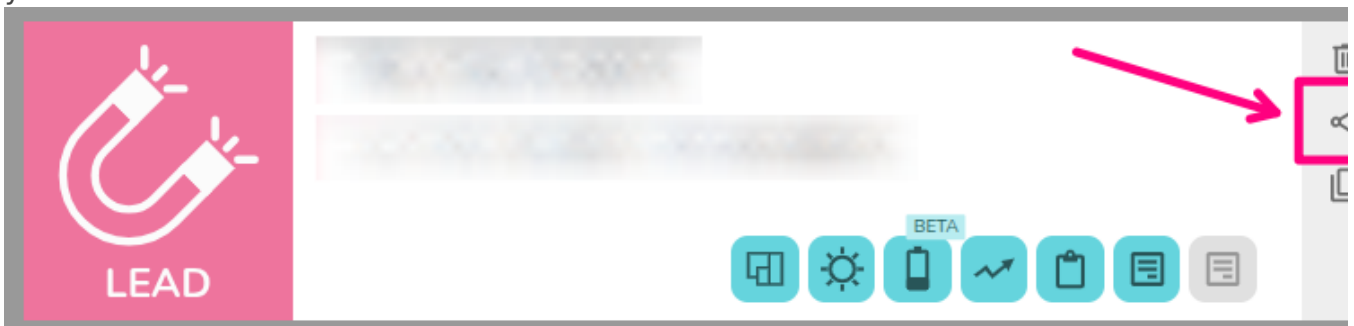
If you would not like projects or components to share by default, you also have the option to share individual projects or components manually. You will also have the option to transfer ownership to another user when sharing manually.

Note: You can only configure sharing permissions on projects and components you own or have manage access to.

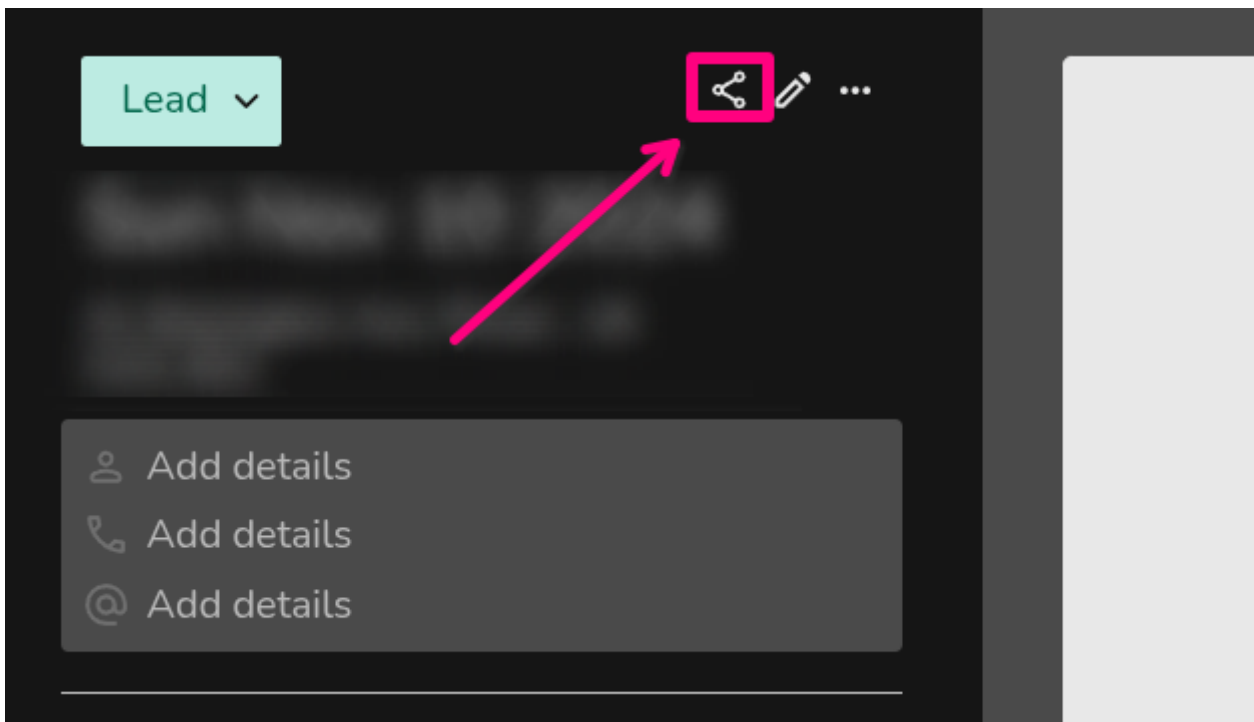
Sharing a project

You can share a project via your list of projects on the My Projects page, or via the project overview page on a specific project.

- From your project list on the **My Projects** page - click on the share icon on the project you want to share



- From the **project overview** page of a specific project - click on the share icon in the top left of the project.



Once you have found the project you want to share, you can then **view who has access to a project** and **edit their permissions**.

- **Select permissions:** Select from the drop downs which permissions you'd like given on the project
- **Change owner:** If you are the owner of a project or have manage permissions, you will see the option to **Transfer ownership**. Click this to view the list of users you can transfer to and select the new owner.
- **Share link:** Click the copy icon to give someone a direct link to view the project. They will need to also have the right sharing access
- **Save:** Click **Save** to confirm any changes

Share project ⓘ



Thu Jul 16 2026

<https://heatpunk.co.uk/?project=69409>

 **Team member 2** You Owner

Transfer ownership

PEOPLE AND GROUPS WITH ACCESS

 **SUNMAX** 1 person
Everyone in your team

Can manage ▼

 **Team member 1**

PEOPLE AND GROUPS YOU CAN ADD

 **heatpunk-support** 8 people
Everyone in external group

No access ▼

Cancel

Save

If you are **not the owner** of a project or **do not have manage permissions**, you will not be able to configure the sharing on a project:

 and or type unknown

If a user with manage permissions has shared on a project, you will see them in the list of 'People and groups with access':

PEOPLE AND GROUPS WITH ACCESS

 **SUNMAX** 1 person
Everyone in your team

Can manage ▼

 **heatpunk-support** 8 people

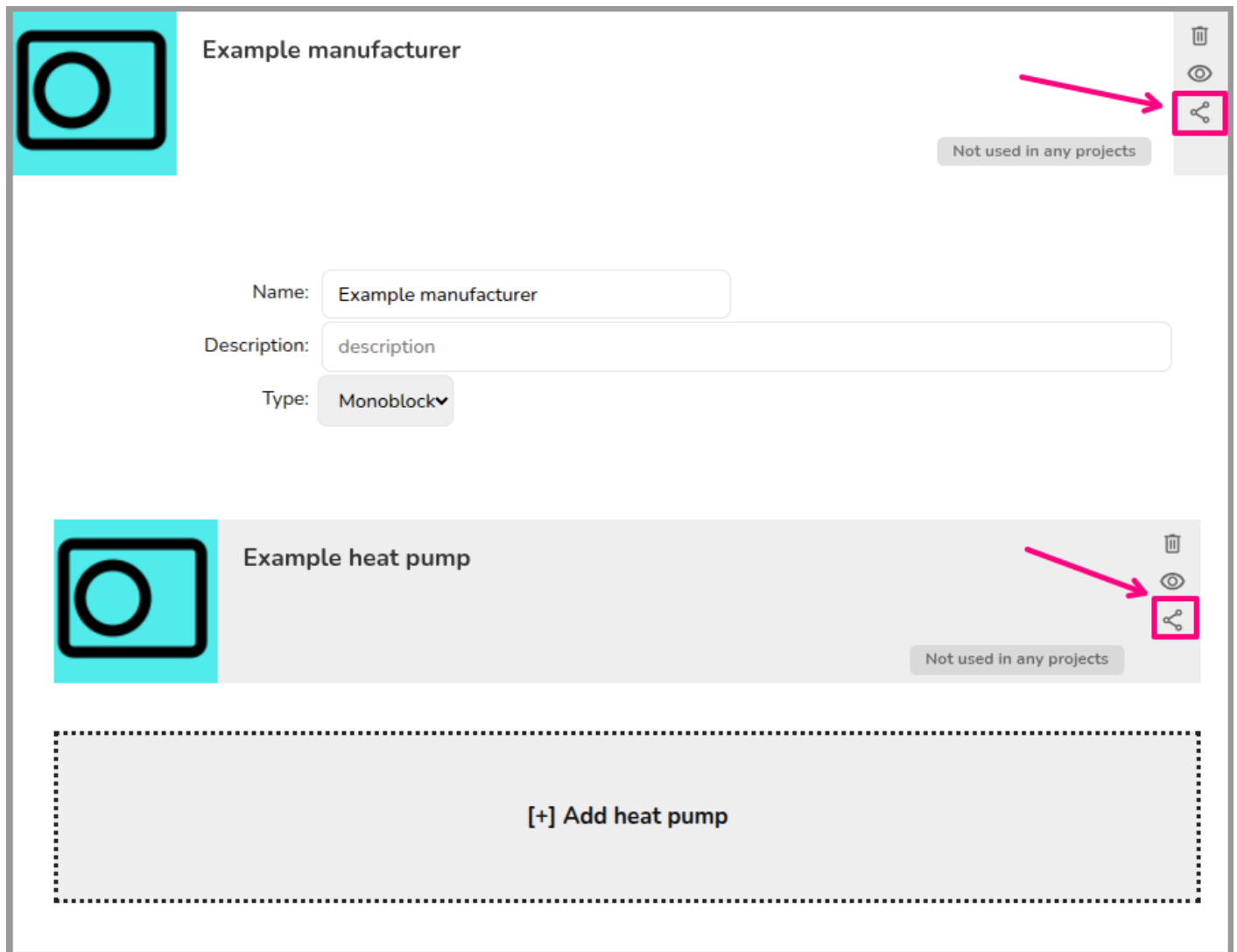
Has access · can edit

Sharing a component

If you are using custom components in Heatpunk, you can share those owned by you with other members of your team. Select My Components from the left sidebar and then select the component type to find the component you want to share.

Click the share icon to configure sharing for the component. As with projects, you can then view who has access to the component and choose which permissions to give.

Warning: You need to share both the manufacturer group and the individual component.



Viewing projects shared with you

To view projects shared with you, make sure this option is selected in the project list page:

Projects

You can search for projects by project name, customer name, address or postcode. To view older projects change the date range shown below.





Show projects shared with you



Show projects modified in the last...

1 month

6 months

12 months

forever



Page 1 of 2 

Projects owned by others will say *Owned by [name]* in the top right corner of the project:



If you're having trouble with any of these permissions or would like to share with individual members of your team rather than the whole team, [get in touch with our support team](#).

Still Need Help? / Want to know more?

- **Related FAQs:** Check out our [Pro and Enterprise FAQs](#) for answers to common questions
- **Further guides:** Take a look at our [Pro help guides](#)
- **Live training:** [Book onto a live demo session](#) to see this feature in action

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.*

Pro: Company Details and Subscription Settings

This guide applies to the **pro** versions of Heatpunk

You can manage your company details and subscription settings by navigating to **Pro Account Settings > General**.

Company details

You can set default information that will be used across all your team's user accounts. This includes company name, number, accreditation, logo, address, and postcode.

The details you set here will be used where relevant throughout Heatpunk tasks, forms, and reports.

Billing information

Here you enter the details we should use for billing your subscription. If you have a separate accounts department, you may wish to use their email address here.

We send out invoices by email every month after your subscription payment has been taken.

Please [reach out to our support team](#) if you would like to change your billing details.

Subscription status

At the bottom of this section you will see your subscription status with your next billing date listed.

Cancelling your subscription

In the bottom right, you'll see the option to **Cancel Subscription**. This will cancel your subscription and your team's accounts will switch back to standard on the date your subscription

would have renewed.

Still Need Help? / Want to know more?

- **Related FAQs:** Check out our [Pro and Enterprise FAQs](#) for answers to common questions
- **Further guides:** Take a look at our [Pro help guides](#)
- **Live training:** [Book onto a live demo session](#) to see this feature in action

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.*

Pro: Email credentials

This guide applies to the **pro** versions of Heatpunk.

With Heatpunk Pro you can send emails to your customer within the software, by setting up your email credentials it means these emails will send from your domain, rather than from no-reply@heatpunk.co.uk.

Email configuration

To edit your email settings navigate to **Pro account settings > Email**.

Team Preferences

- General
- Email
- Documents
- Customer Proposal
- Automatic Pricing
- Shrunk Punk
- CRM Connections

Here you can enter email credentials to allow emails to be sent from your own email address, how this is set up will depend on what email provider you are using.

OAuth 2.0 - Gmail or Microsoft 365

If Gmail or Microsoft 365 is your email provider, then simply select **OAuth 2.0**, select the relevant option and click connect, this will direct you to your email where you can approve the connection.

Once it is linked, you can send a test email to make sure it's working as intended.

SMTP

If you have a different email provider then you will need to set up using the **SMTP** option. What is then required for each field is dependent on provider and you will likely be able to find instructions online by searching for your provider and 'SMTP credentials'. Below is some general guidance for each field

SMTP Username	These credentials are provided by your email service provider and are used to authenticate your email client
---------------	--

SMTP From Address	Optional: This is the email address that recipients see as the sender of the email. In most cases this will be the same as the SMTP username.
SMTP Name	Optional: this will appear next to the 'from address'.
SMTP Host	This will vary depending on provider. The format will be something like smtp.provider.com.
SMTP Password	This will usually be an App Password that you need to set up but in some cases it will be your email password.
SMTP Port	Optional: by default this will be 587 but in some cases this will need to be changed.

Once all required fields are filled in, click **save credentials**. You can then send a test email to make sure it's working as intended.

Still Need Help? / Want to know more?

If you are having trouble setting this up, please [contact support](#). Please let us know what provider you are using and a screenshot of the email page with your inputs (do not share your password).

- **Related FAQs:** Check out our [Pro and Enterprise FAQs](#) for answers to common questions
- **Further guides:** Take a look at our [Pro help guides](#)
- **Live training:** [Book onto a live demo session](#) to see these features in action

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.*

Pro: Customer Proposal Customisation

This guide applies to the **Pro** versions of Heatpunk

With Heatpunk Pro, you are able to customise the **proposal document** that you send to your customers. This can help you align the proposal more with your branding and help you stand out!

What can I customise?

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 footer to appear on all pages of the proposal document with your logo and company information.
- Add your terms and conditions and the scope of work sections to the proposal.
- Configure the quote display.

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**.

Setting up

Navigate to **Pro account settings > Customer Proposal**. There will also be a **Documents** section in your Pro account settings where you can manage all the images you upload.

[Colours](#) [Cover Page](#) [Footer](#) [Contents Page](#) [Terms and Conditions](#) [Scope of Works](#) [Display of Quote](#)

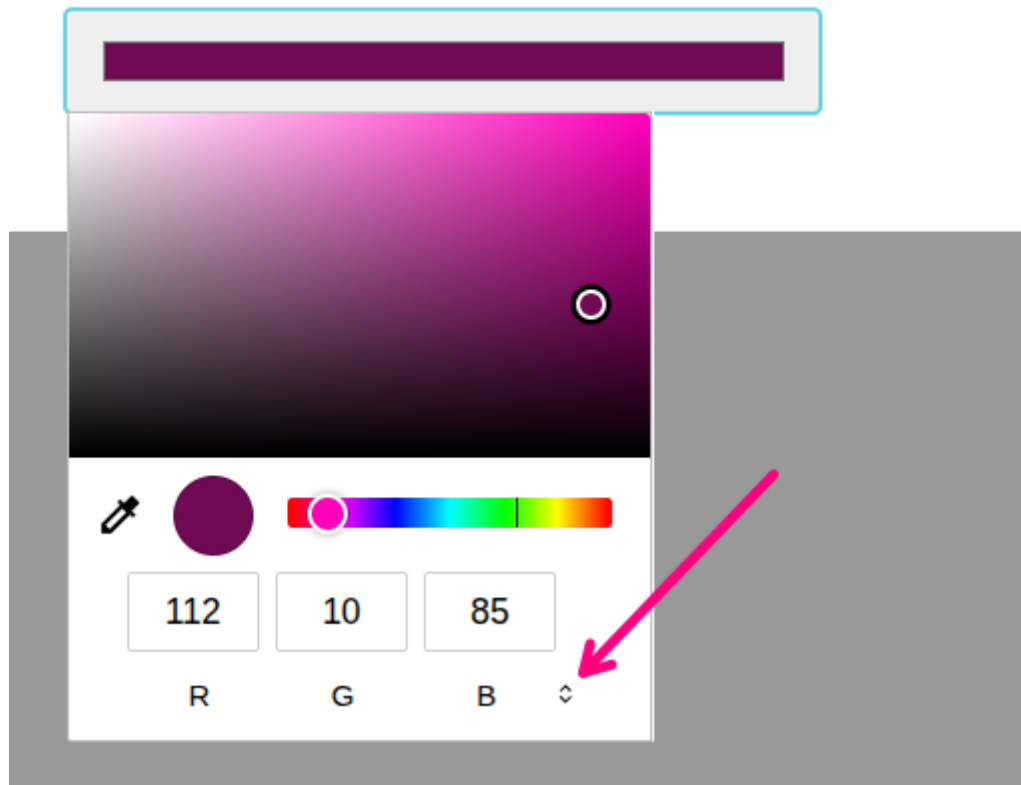
Colours

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

You can precisely match this with your branding colours with the RGB, HSL or HEX code, use the arrows to navigate between these options.

Colours

Header colour



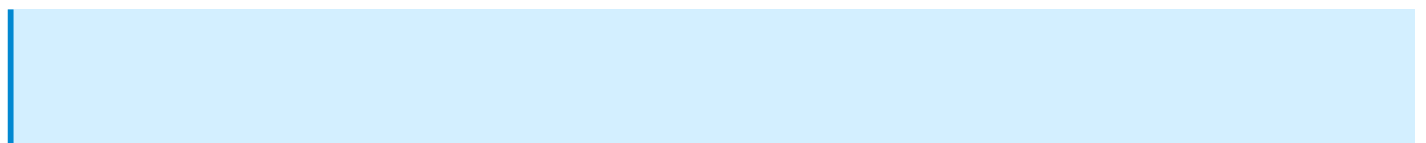
Cover page

Select whether you would like to include a custom cover page and whether you would like the customer name and address overlaid on your cover page and which colour you'd like this text to be.

☒ Do you want to include a custom cover page?

☒ Do you want text with the customer name and the address overlaid on the bottom third of the image? You should make sure the text is a strongly contrasting colour to this part of the image.

Proposal page text colour



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.

Once you have your custom cover page, either add it in the **Documents** tab or in the cover page section click **Select from uploaded image > Add images**. After uploading you will be able to select your cover page. You also have the option to use an image from a URL.

Select from uploaded image



Upload an image of A4 portrait aspect ratio for the cover page to your team account. Note that if you remove an image, it will no longer be available for viewing in any proposal you have sent out.



Link by URL

Enter a URL for a background image for the cover page, e.g.
<https://static.easy-pv.co.uk/graphics/backgrounds/blueswirl.jpg>.

Select from uploaded image

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.

☒ Do you want to include a custom footer?

Phone number

01223 854051

Address

Midsummer Energy, Milton

Website

<https://midsummerwholesale.co.uk>

Footer text colour

Footer background colour

Select from uploaded image



Upload a logo to your team account. Note that if you delete the logo from your account, it will no longer be available for viewing in any proposal you have sent out.



Link by URL

Enter a URL for a background image for the logo, e.g. <https://static.easy-pv.co.uk/graphics/uk-flag.png>.



No logo

No logo to be displayed on the footer.

Select from uploaded image

Make sure the footer text does not overflow onto a second line when you generate the proposal or this will cause formatting errors.

Contents page

In this section you can add a custom cover letter with a custom header and contents. This can be overridden on a per-project basis.

☒ Do you want to use a custom cover letter on the contents page? If not, a default cover letter will be used.

You can also include an 'About us' section with an optional custom image. The 'About us' section should be a short description, make sure it does not overflow onto the next page of the proposal.

☒ Do you want an 'About Us' section on the contents page?

Do you want a small image for the 'About Us' section?

Select from uploaded image



Upload an image to your team account. Note that if you delete the logo from your account, it will no longer be available for viewing in any proposal you have sent out.



Link by URL

Enter a URL for a background image for the image, e.g. <https://static.easy-pv.co.uk/graphics/uk-flag.png>.



No image

No image to be displayed on the 'About Us' section.

Select from uploaded image

Terms and conditions and scope of work

Here you can input your terms and conditions and scope of work. In each case you can use the options at the bottom of the text box to format the text:

 or type unknown

Both these options can be overridden on a project by project basis.

Changes made to the contents page, terms and conditions and scope of work will **not** automatically refresh in projects where you've already opened the customer proposal task. Click the refresh icon next to where it says 'Customer proposal' to reset those fields to what you've got in your settings.

Display of Quote

In this section you can configure the quote format. Select whether you would like the quote to display goods and services separately and whether you'd like these sections to display as individual lines.

Line display

Choose how you would like to display prices to the customer in the proposal document.



Single line
Just one line for the whole quote



Goods and services
Separate sections for goods and services

Line item display

Choose whether you want to show individual line items, or just one line for goods and one for services. You can also create a detailed scope of works for each project.

☐ Combine individual line items into a single line on the proposal

Finally, you can select whether you'd like prices to display for each line item or for it to only show totals or subtotals.

Display prices

Choose whether you want to show the price for every line or just the total for goods and the total for services

☐ Display the price for every line

Still Need Help? / Want to know more?

- **Related FAQs:** Check out our [Pro and Enterprise FAQs](#) for answers to common questions
- **Further guides:** Take a look at our [Pro help guides](#)
- **Live training:** [Book onto a live demo session](#) to see these features in action

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.*

Pro: Automatic pricing

With Heatpunk Pro you can either set pricing based on:

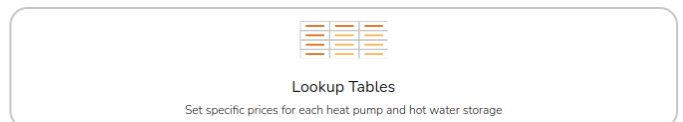
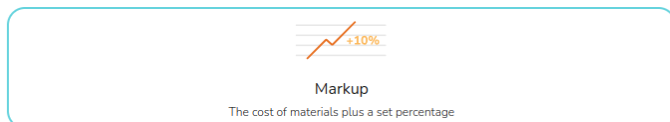
- **The cost of materials plus a markup**
 - Involves cost of material plus a set percentage
 - Is best for when you use a variety of components
- **Custom lookup tables**
 - Involves using specified prices for each heat pump and hot water storage
 - Is best for when you always use the same components

On top of the cost of materials, you can set up additional charges for delivery of goods, plumbing and electrical labour and travel to the site.

Pricing settings can be accessed via **'Pro Account settings' > 'Automatic pricing'**.

Configuring pricing for your projects

Choose if you are using markup or lookup tables.



Option 1: Cost of materials plus a markup

When using markup, you enter the percentage markup for goods prices.

Markup

Enter the percentage markup for goods prices to be used when a lookup table entry is not found or if you have chosen not to use a lookup table.

%

This will apply the specified markup to your Midsummer wholesale price. Ensure your wholesale account is connected, otherwise retail wholesale prices will be applied. See our guide on

[Connecting to Midsummer](#) for more information on this.

Option 2: Lookup tables

When you have chosen lookup tables, you can first choose to use a markup-based pricing for any designs that don't match one of the lookup tables you have entered. In this case the marked-up Midsummer wholesale price will be used as a fallback.

You can then create your lookup tables for heat pumps and hot water storage by selecting from the options in the drop down menu and adding the respective prices to goods and services.

Lookup table - heat pumps

Enter the value for goods and services for each heat pump. If a goods entry is left blank, the Midsummer wholesale price will be used.

Name	Goods	Services
	£ Goods	£ Services
+ Add Row		

Lookup table - hot water storage

Enter the value for goods and services for each hot water storage. If a goods entry is left blank, the Midsummer wholesale price will be used.

Name	Goods	Services
	£ Goods	£ Services
+ Add Row		

Lookup tables are most useful if you install just a few different system combinations. If you use a wide range of kit, it's probably more efficient to use the 'markup' method. Lookup tables also require additional maintenance as the component prices will not change automatically with costs.

Additional Radiators

Each radiator added via the *Heat Pump* task will automatically generate an entry in the *Financial* task. Currently, we do not support varying prices for different radiator types. However, here you can enter the cost of goods and labour for different sized radiators.

You can also set a default radiator price for cases where the radiators used do not match any of your lookup table entries.

Lookup table - radiators

Width	Height	Goods	Labour	
Width! mm	Height! mm	£ Goods	£ Labour	—

+ Add Row

Default radiator prices: Enter the fallback price to be used when a lookup table entry is not found. Enter 0 if you do not want to generate an automatic entry.

	Goods	Labour
Default radiator prices	£ Goods	£ Labour

Other items▢

With both options above, after setting up your pricing, you can add prices additional items.

Default items

These items will be added to every project by default. Examples include delivery of goods, plumbing labour and electrical labour.

Optional items

These items will be prompted for addition at the start of the Financial task. Examples include an extended warranty or replacement of microbore pipework.

In each case, you add the description as you want it to appear on the financial task and then a cost of the goods and labour.

Travel

To set up your office location, navigate to 'My Account' > 'Preferences' > 'General' > 'Company Details' and drag the location pin on the map. The travel distance will be automatically calculated as the driving distance from the office to the project address.

You can then add any additional costs for travel over a certain distance.

For distances over

Travel cost

60

miles

£ 100

—

70

miles

£ 120

—

+ Add Row

Still Need Help? / Want to know more?

- **Related FAQs:** Check out our [Pro and Enterprise FAQs](#) for answers to common questions
- **Further guides:** Take a look at our [Pro help guides](#)
- **Live training:** [Book onto a live demo session](#) to see this feature in action

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.*