Getting started with Pro

- Getting started with Heatpunk Pro
- Setting up your Heatpunk Pro account
- 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.*

Setting up your Heatpunk Pro account

heatpunk.co.ukThis guide applies to Heatpunk UK.

How do I upgrade to Pro?

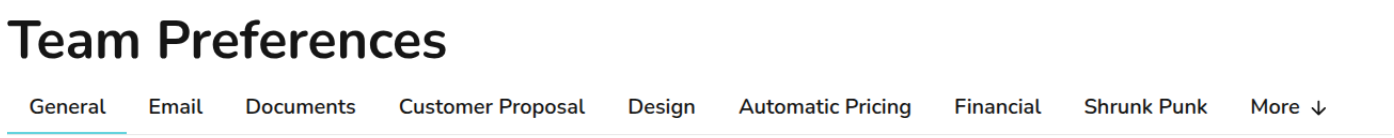
Click **Upgrade to Pro** in the top right corner, while logged into the account you would like to be the Owner of the Pro team. This Owner account cannot be changed or removed from the team.

1. Click Upgrade to Pro in the top right corner
2. Add team members and set their role type
3. Connect to Midsummer so your pricing correctly applies for all team members
4. Fill in billing details
5. 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.

Configure team settings

Correctly setting up your **team preferences** can help you make the most of Heatpunk Pro. Navigate to **Pro account settings** and click through each tab to set this up. Find further information in each section below.



1. General

If you have multiple users in your team, you can edit team members and what role they have here. Read more about Pro team management and user roles.

image.png
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The details you set under **Company Details** will be used throughout Heatpunk tasks, forms, and reports.

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At the bottom of this section you can view and change your **subscription status**.

2. Configure email credentials

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

Read more on how to set up email credentials.

3. Upload team documents

Any files uploaded to the documents tab will be accessible to any user in the team when sending emails through Heatpunk. Upload your terms and conditions, MCS certificate or anything else you would like available for all projects.

TeamUploads.gif
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4. Set up proposal customisation

With Heatpunk Pro you have the option to customise the customer proposal to align more with your branding.

Read more about setting up your customised proposal.

5. Automatic pricing

With Heatpunk Pro you have the option to set up automatic pricing options to make things quicker.

Find out more about automatic pricing.

6. Shrunk punk

Shrunk punk is a lead generation tool to help you grow your business.

Learn more about Shrunk Punk.

7. CRM connections

In this tab you can access your API key to connect with CRMs and job management platforms.

Take a look at our developer guidelines if you would like to set up your own integration.

8. Design

In the Design tab you can configure temperature settings. Team-level default design settings trump user-level default design settings.

Find out more about the outdoor design temperature (ODT) settings.

Getting started with Pro features in a project

Once you've configured your Pro account settings, you can get started using Pro features within a project.

Project statuses

From the project overview, you'll now be able to set the status on your project. Use filters on the right-hand side to view jobs in each stage.

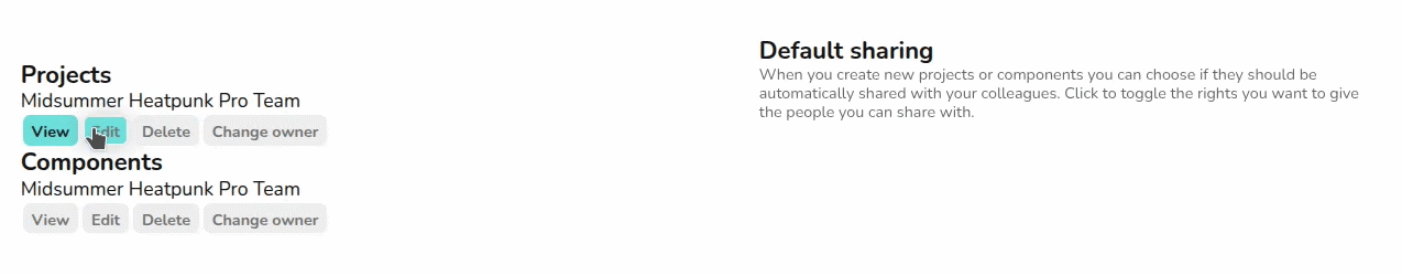
ProjectStatuses.gif
Image not found or type unknown

Project and component sharing

Old projects and components will not be shared with your team by default. Any old projects you'd like shared with your Pro team, you can share manually. If you'd like all old projects or components to be bulk shared get in touch and we can do this for you.

Sharing.gif
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If you'd like new projects or components shared by default, navigate to **My account** > **Preferences** > **General** and then **Default sharing**. Select the permissions you'd like to be given by default on new projects. These settings are account (not team) specific so will only apply to the account you are logged into.



Read more about sharing.

Using project features

Read more about the Pro features you can now use in projects:

- E-signing
- Document storage
- Sending emails
- Survey and install records
- DNO applications via Connect Direct

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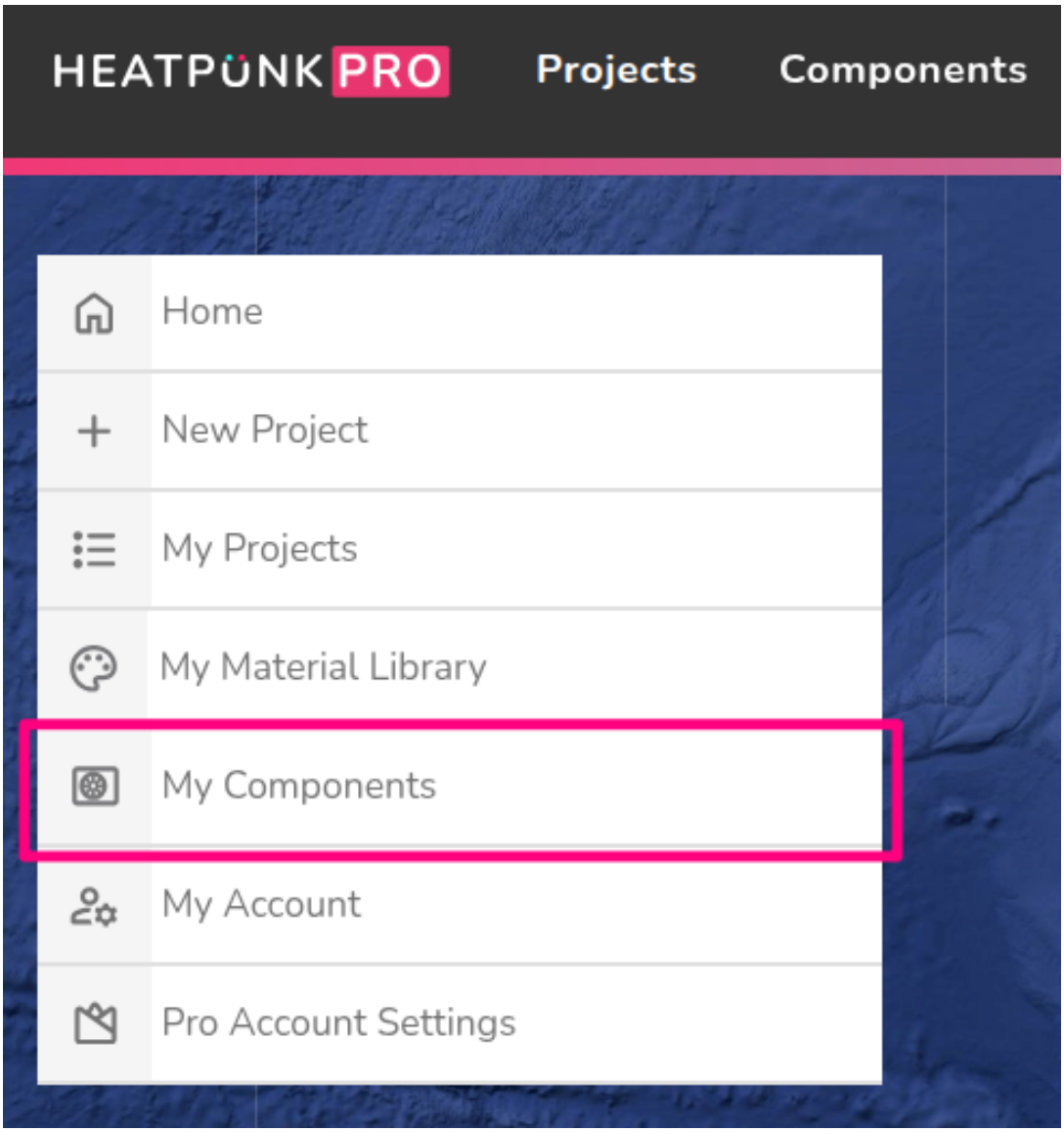
Pro: Create and manage your components

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

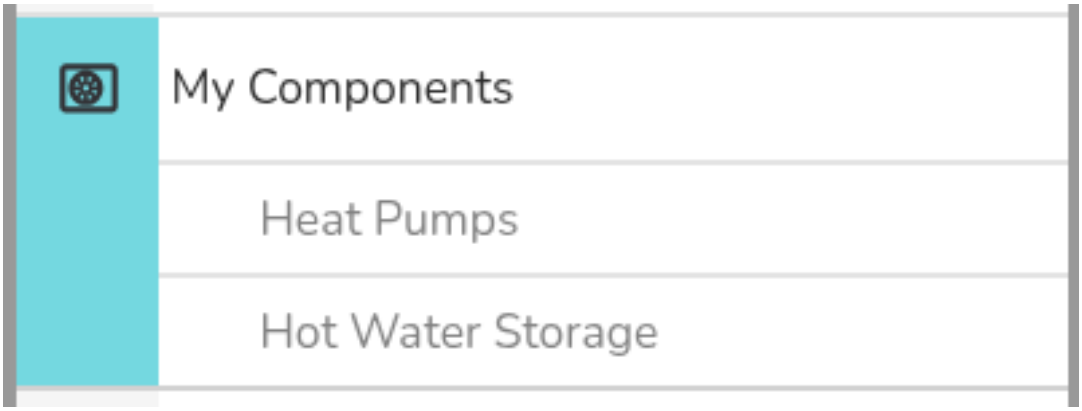
For most components you will need to add, there is a set of technical information that needs to be entered so that Heatpunk can conduct necessary performance calculations. This information is available from the manufacturer’s technical datasheet for that specific product.

> 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

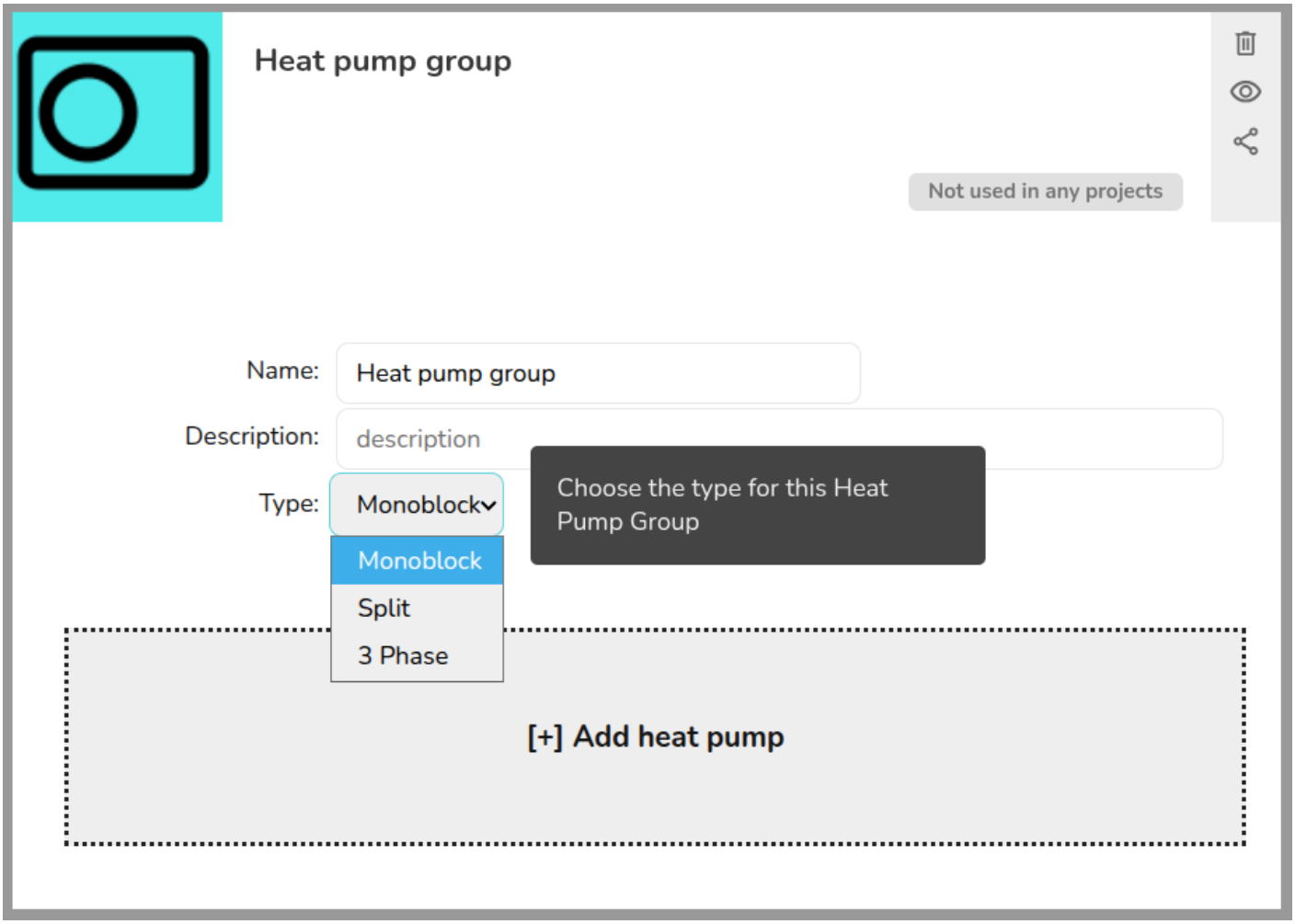
Creating manufacturer

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.

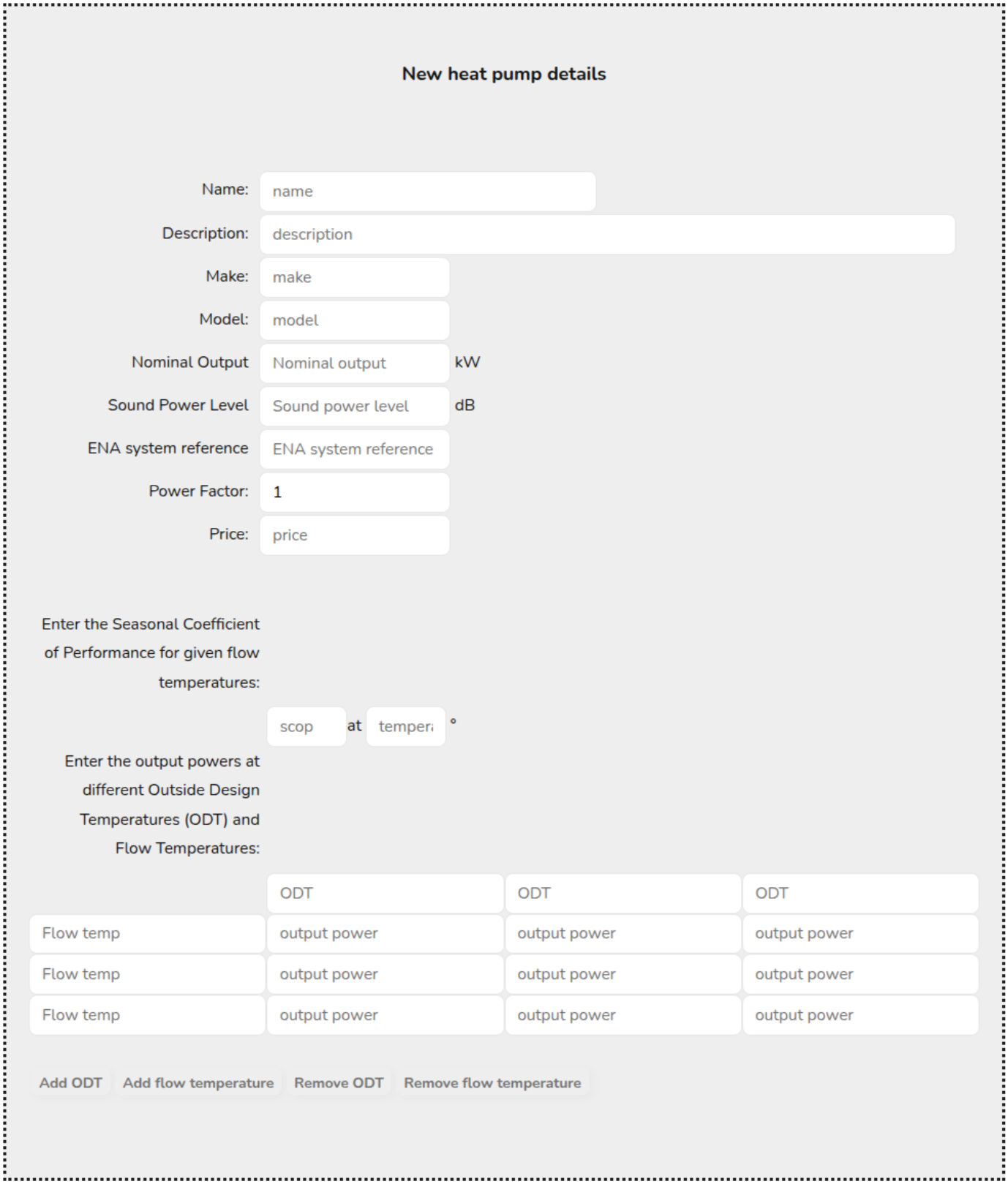


Inputting information from datasheet

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.



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℃). 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℃ to 2℃ ODT and 35 to 55℃ 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:

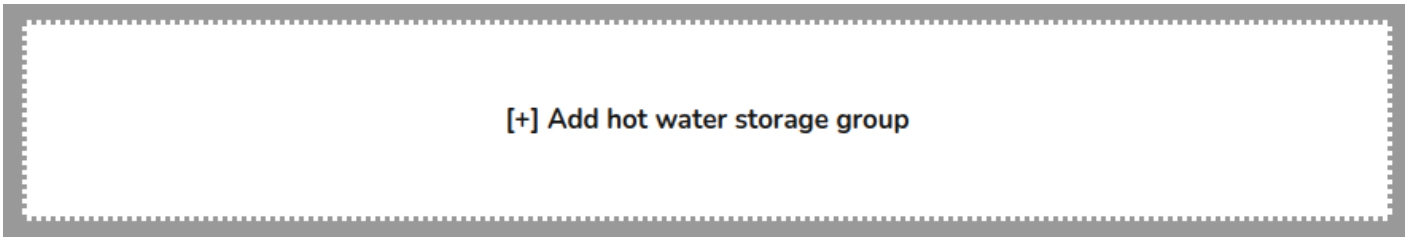
- You can name the heat pump you have created and add a short description. Both the name and description will show when choosing the heat pump as well as in your final customer proposal.
- You can add a photo of the heat pump. As with the name and description, this will show when choosing the heat pump 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.

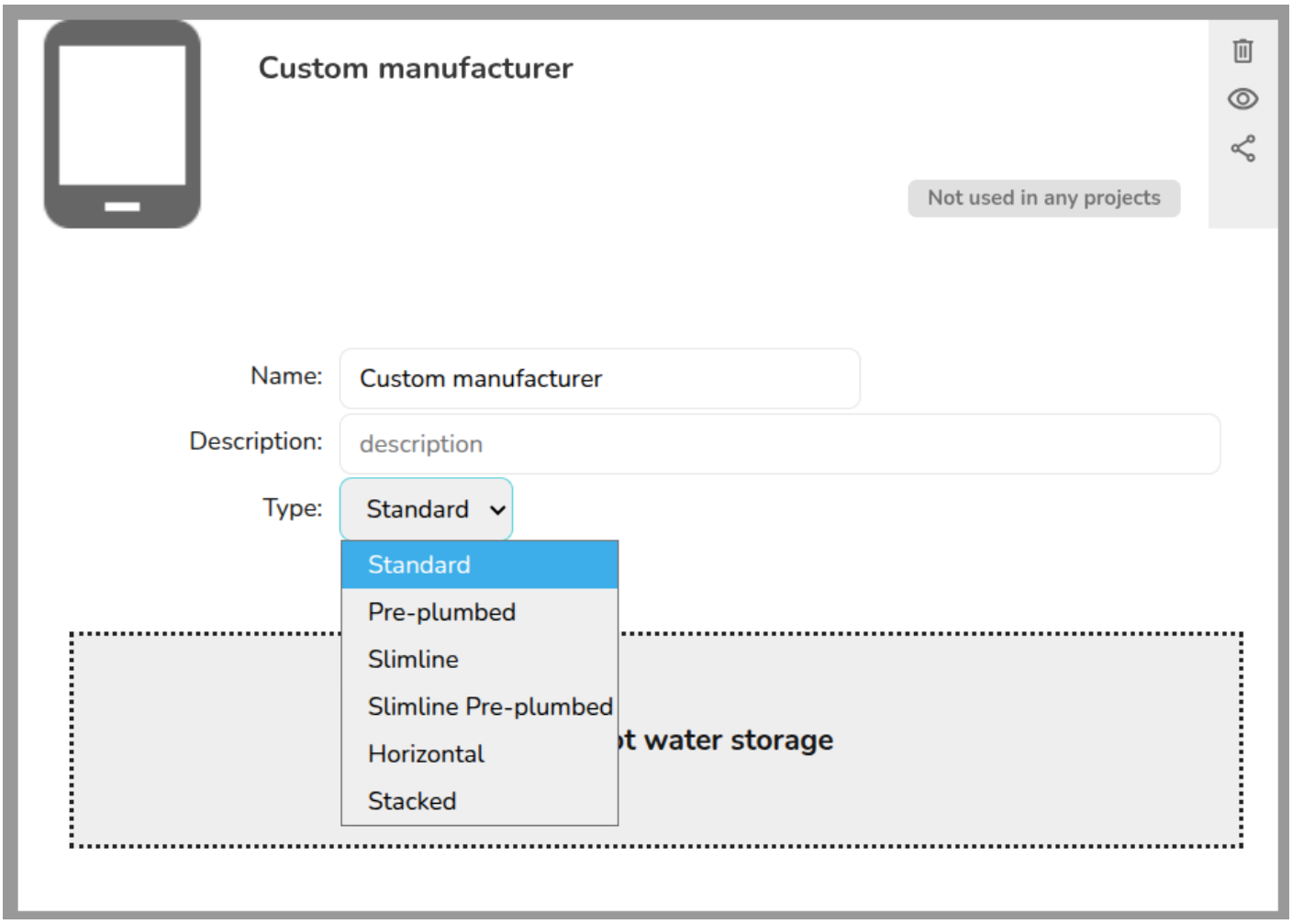
Once you have added a heat pump successfully - you'll be able to select it in the list of heat pumps when creating a new project.

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.

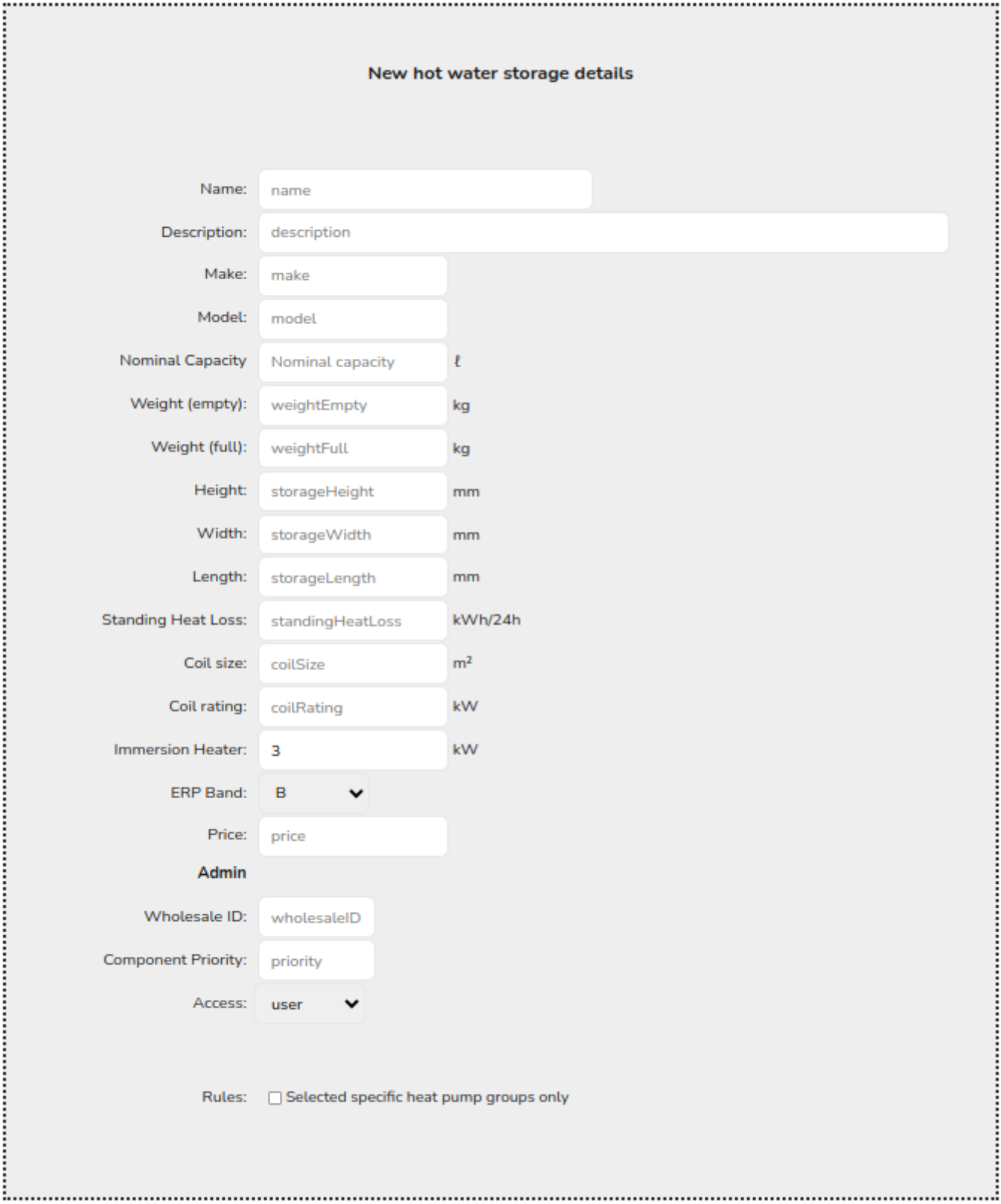




Inputting information from datasheet

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.



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 (m^2)
- 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.*

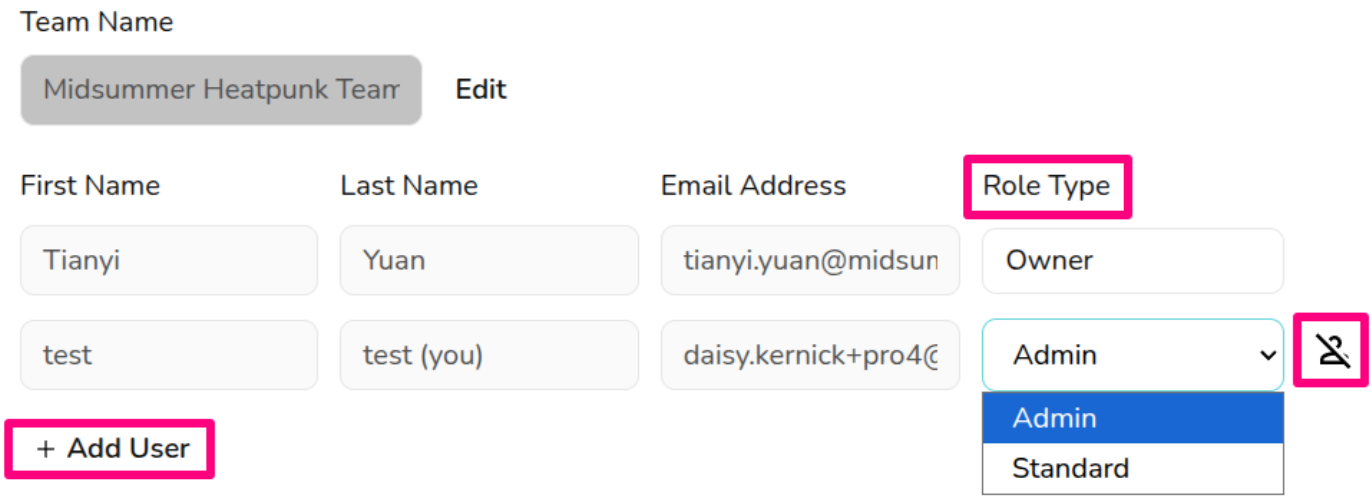
Pro: Team Management

> 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.



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.



> 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.

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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:

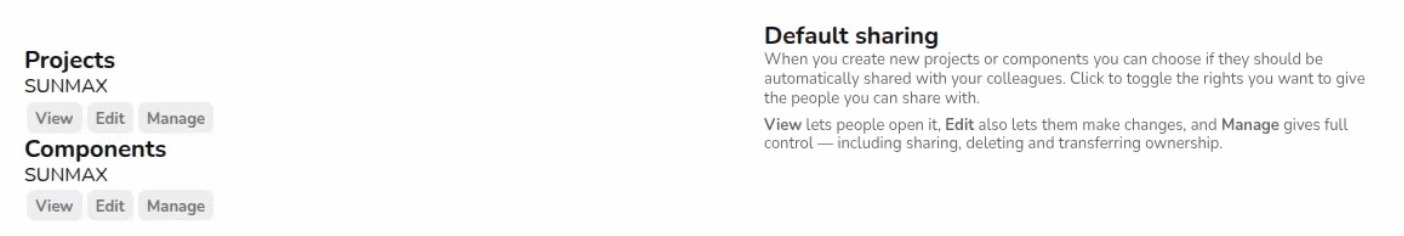
- **View**: Users will be able to view projects or use the component, but not edit it.
- **Edit**: Users will be able to view and make changes to the project or component.
- **Manage**: Users will be able view, edit and permanently delete the project or component, transfer ownership of the project and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

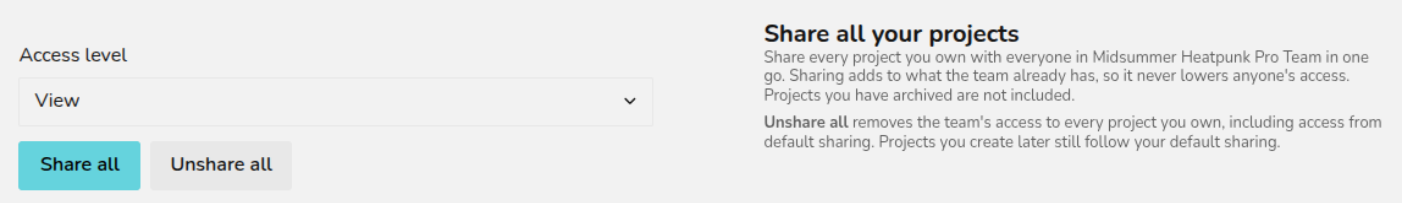
In this section, simply select which sharing permissions you would like to be granted automatically when creating a project or component.



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

Share all your projects

Each user in a Pro team can choose to bulk share all their projects with the team in one go. Navigate to **My Account** > **Preferences** > **General** and go to **Share all your projects**.



Select the access level you would like to give your team and hit the **Share all** button. Sharing adds to what people already have so nobody loses access they were given before. Projects you have archived are not included. This applies to all existing projects, any new projects will follow the **default sharing** rules you have set.

Unshare all does the reverse and removes the team's access from every project they own. This includes projects that you might have shared manually.

Manual sharing

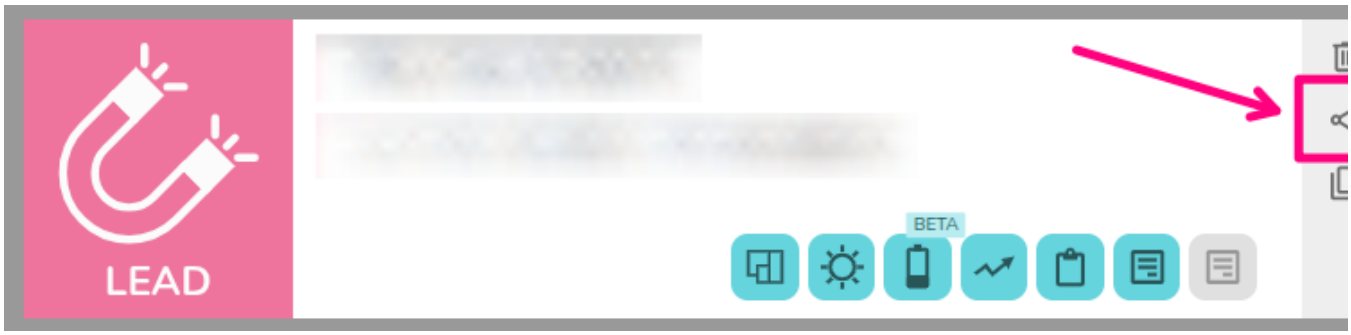
If you would not like projects or components to share by default, you also have the option to share individual projects or components manually. You will also have the option to transfer ownership to another user when sharing manually.

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

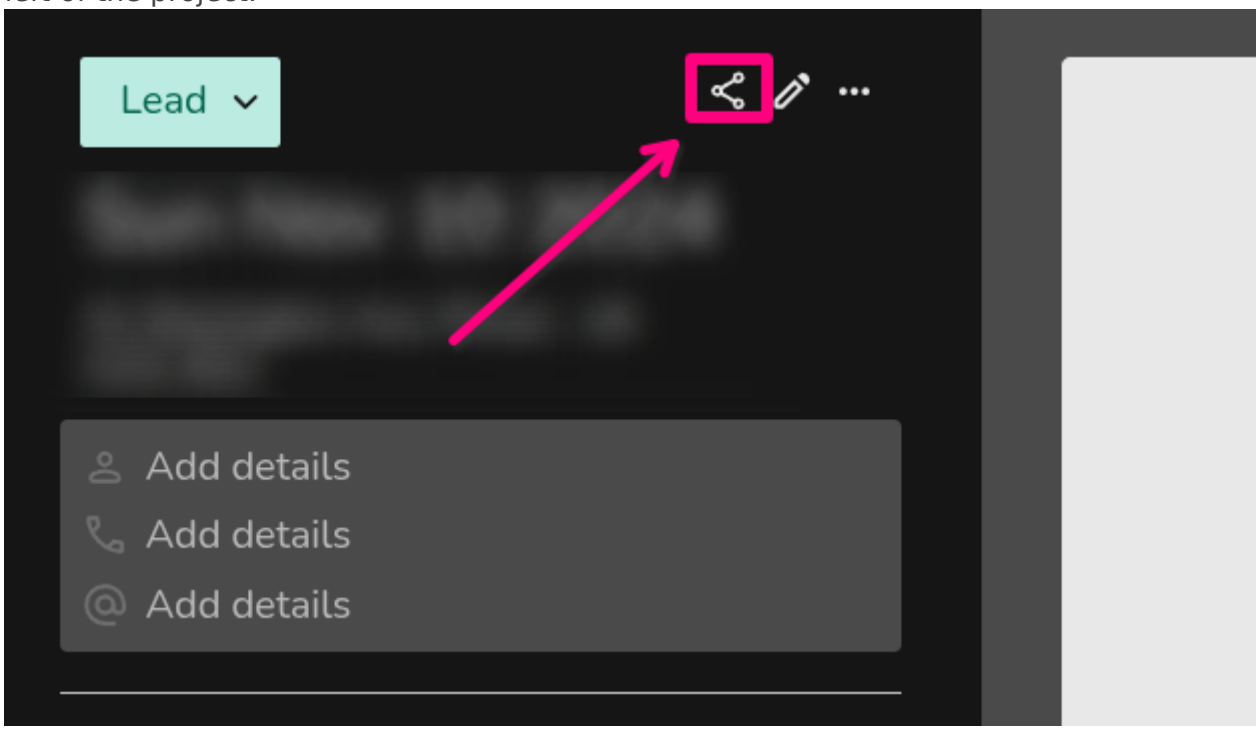
Sharing a project

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

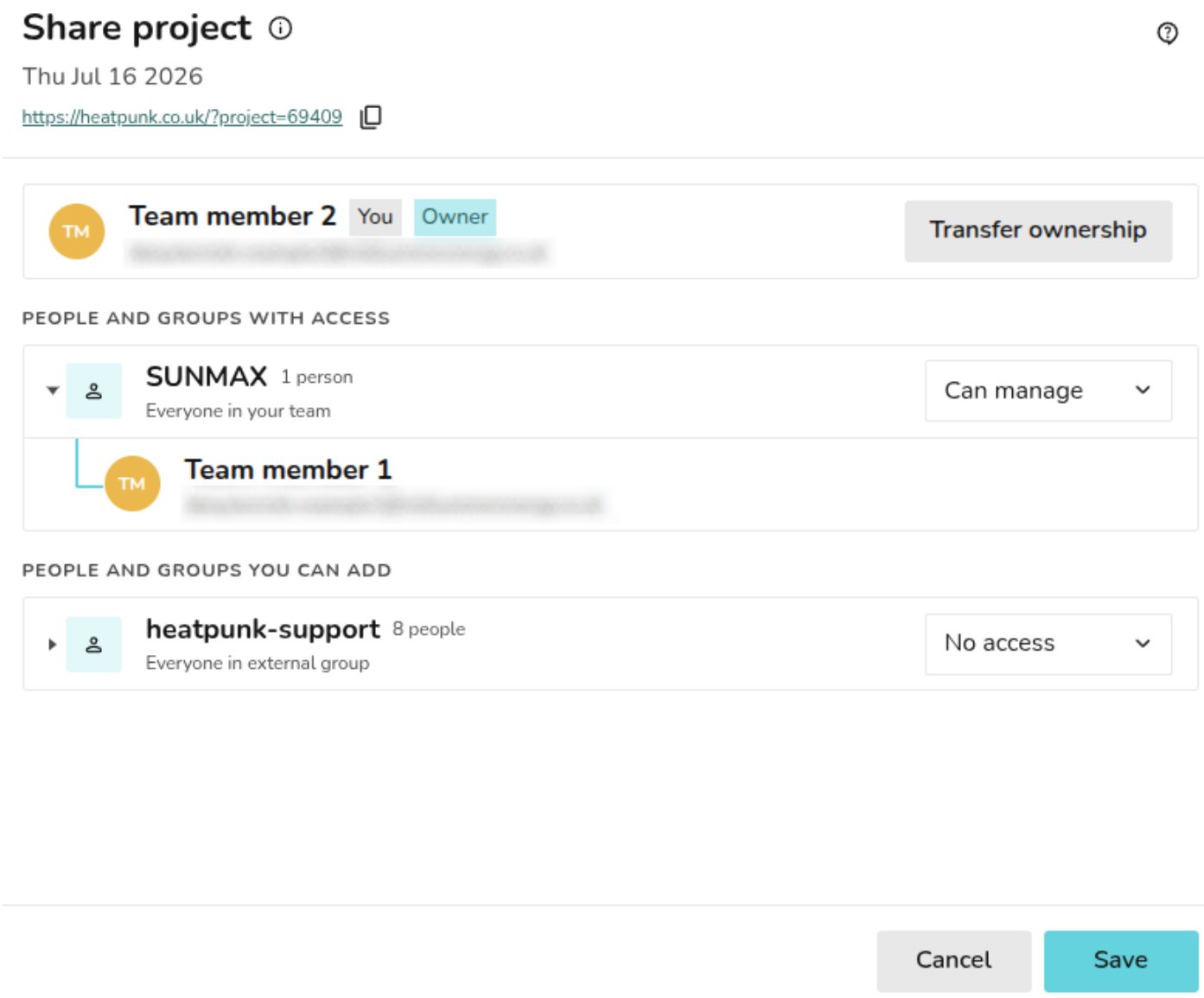


- From the **project overview** page of a specific project - click on the share icon in the top left of the project.



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

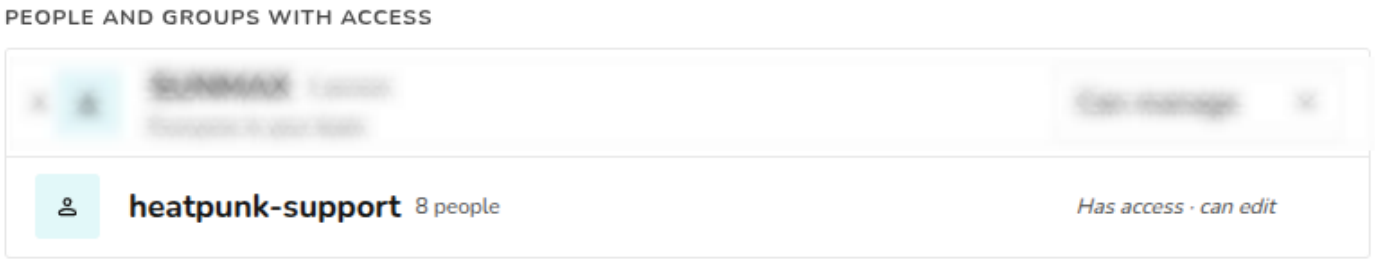
- **Select permissions**: Select from the drop downs which permissions you'd like given on the project
- **Change owner**: If you are the owner of a project or have manage permissions, you will see the option to **Transfer ownership**. Click this to view the list of users you can transfer to and select 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



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:

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

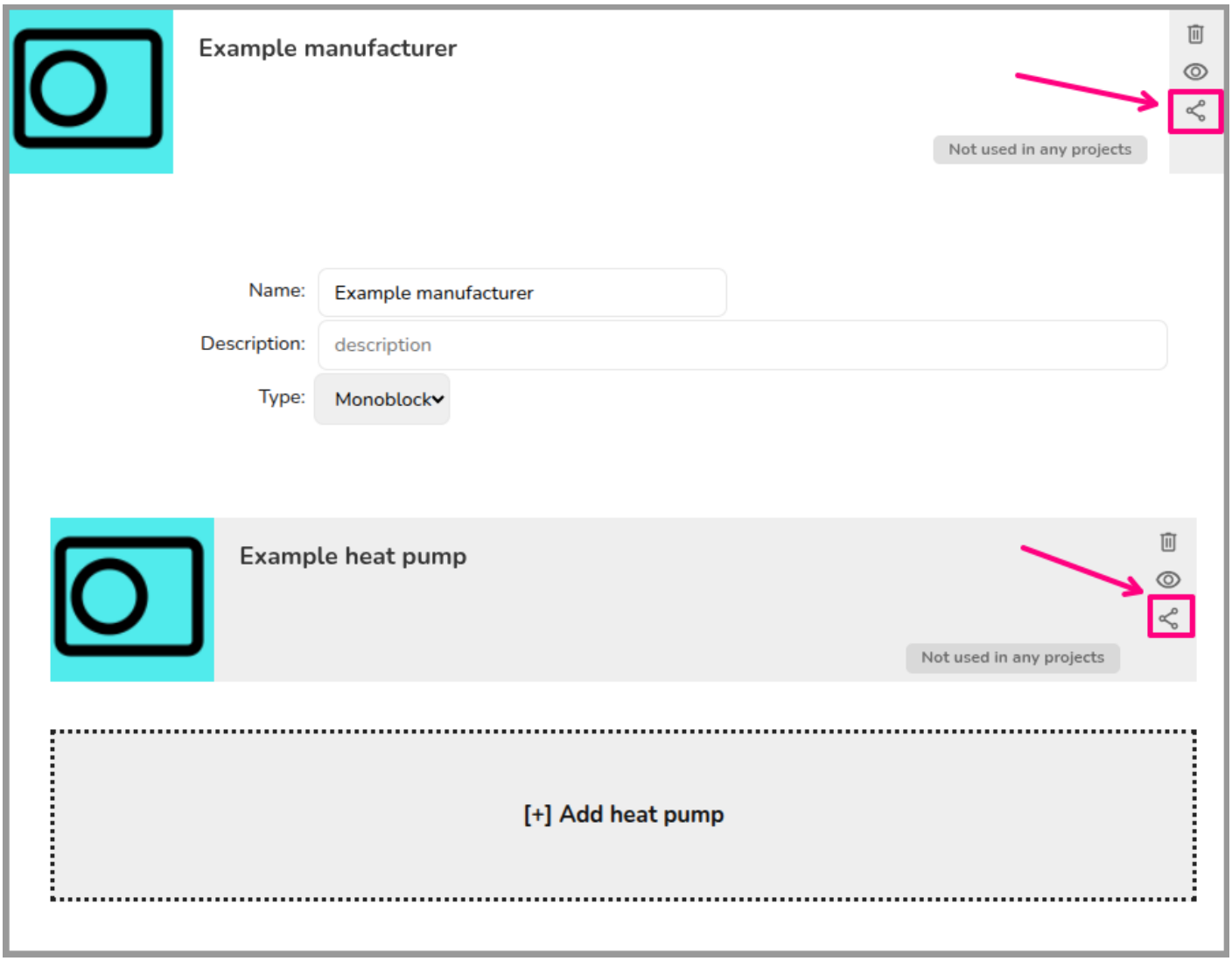


Sharing a component

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.

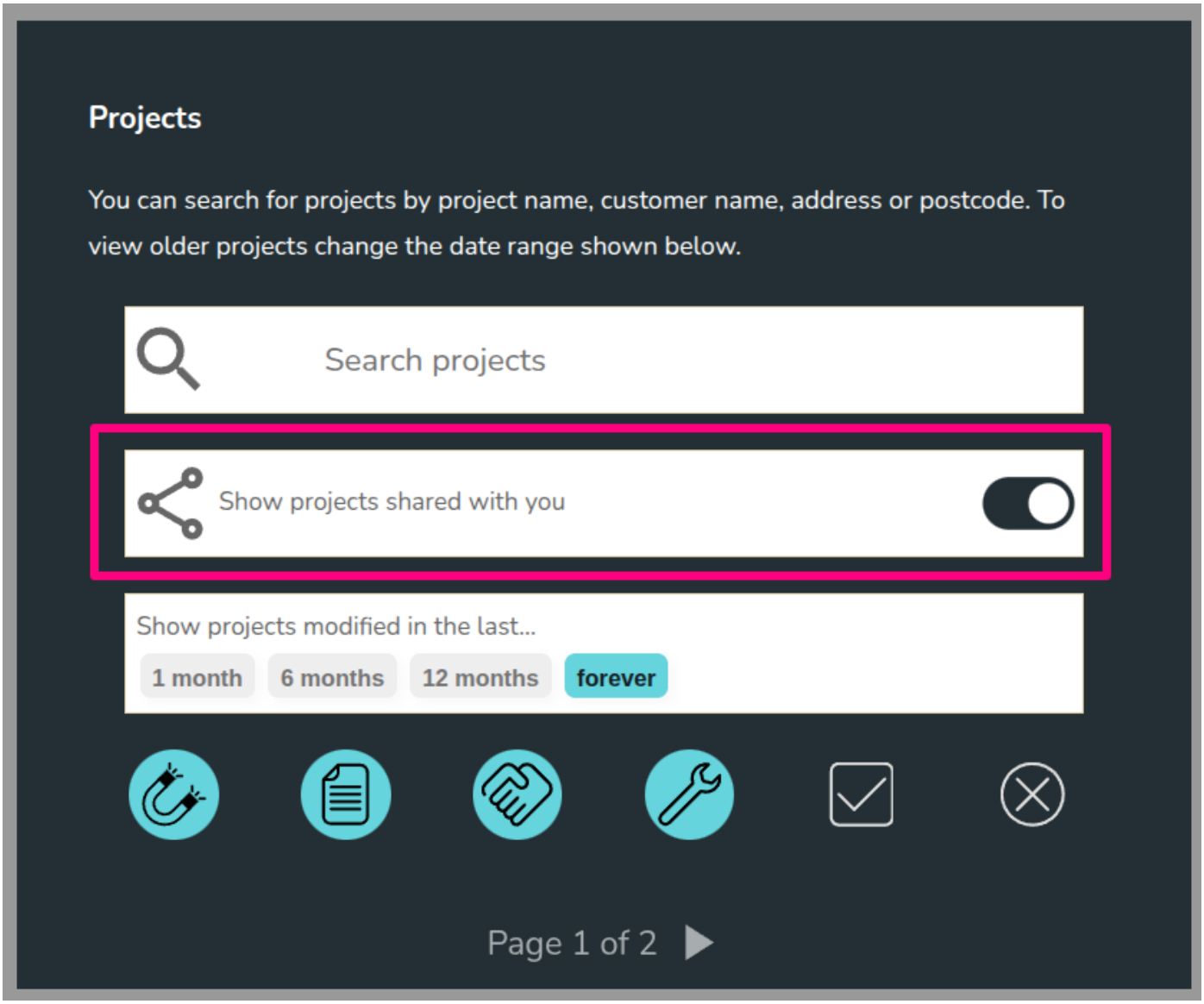
Click the share icon to configure sharing for the component. As with projects, you can then view who has access to the component and choose which permissions to give.

> **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 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.

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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.

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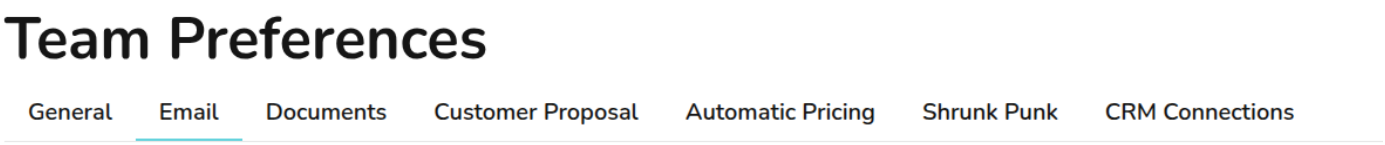
Pro: Email credentials

> 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.**



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).

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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?

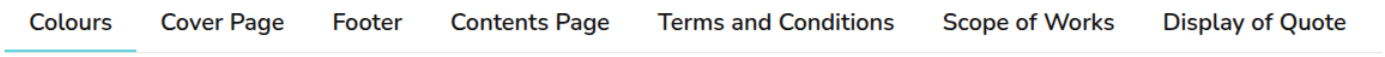
You have the option to:

- 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

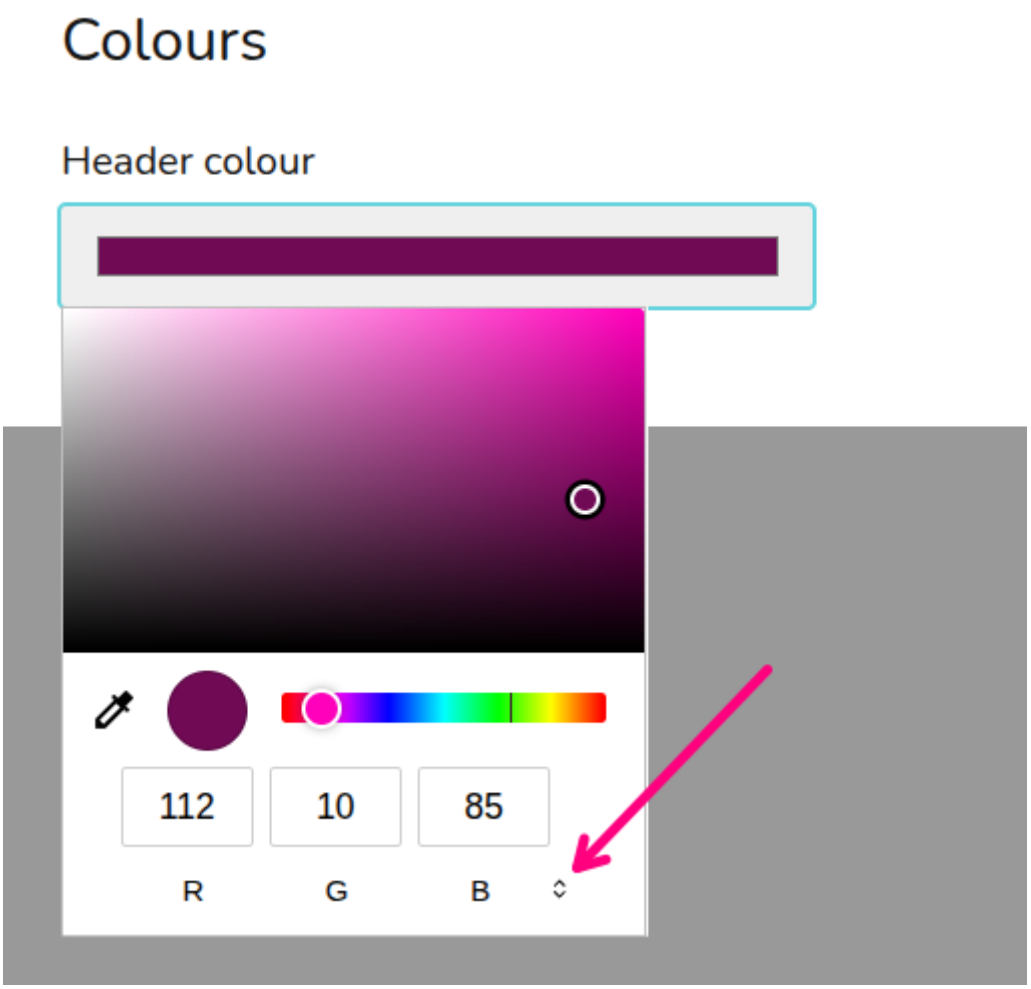
Navigate to **Pro account settings** > **Customer Proposal**. There will also be a **Documents** section in your Pro account settings where you can manage all the images you upload.



Colours

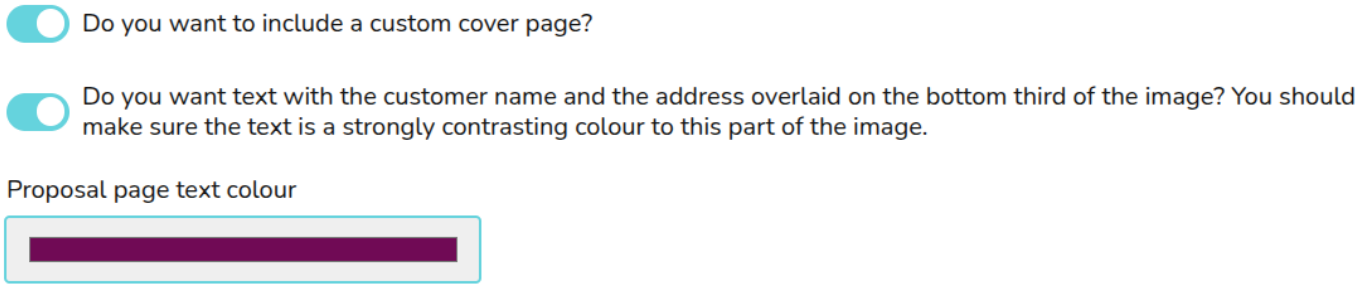
Select the colour you would like **headers** to appear in the proposal document.

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



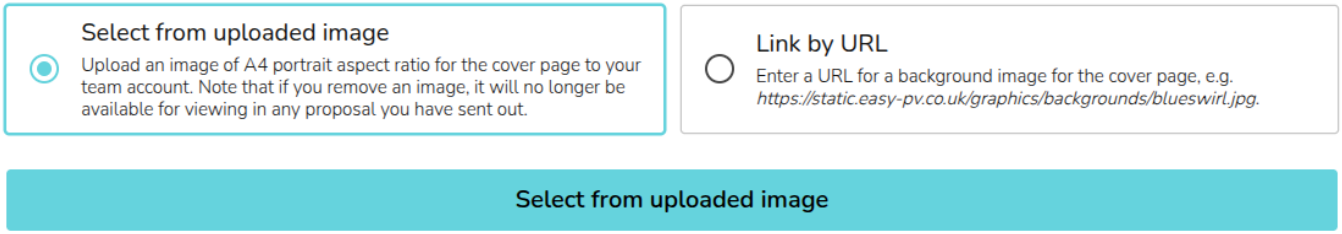
Cover page

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.



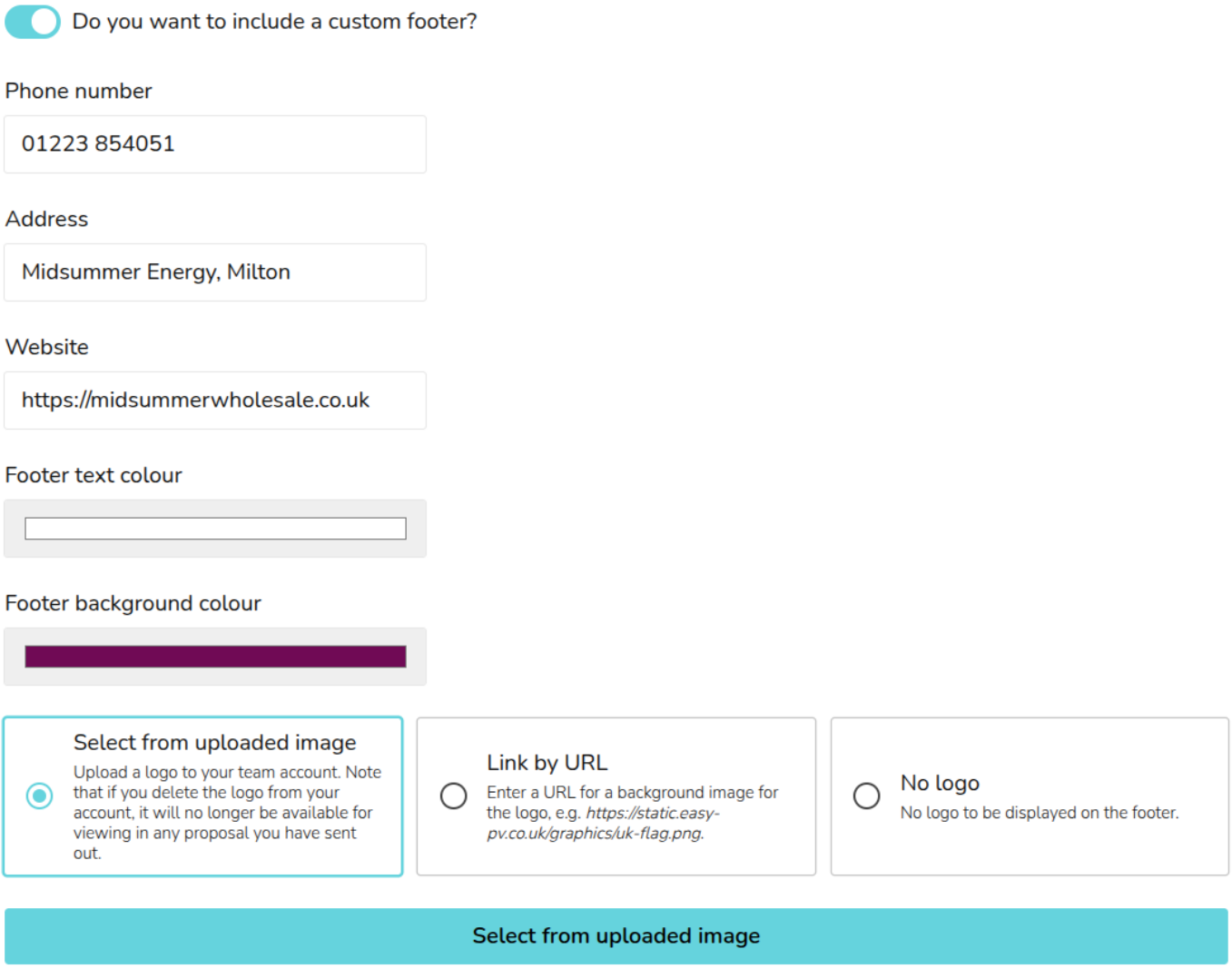
> If you don't already have a preferred way of making a cover page, you might find Canva useful. We have created a template with some additional instructions that you can use to create your own cover page design in Canva. When you are finished, click Share, then download, change the file type to PNG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



Footer

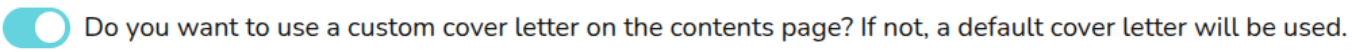
In your custom footer you can input a phone number, address and website. You can also select the footer background and text colour and upload a logo.



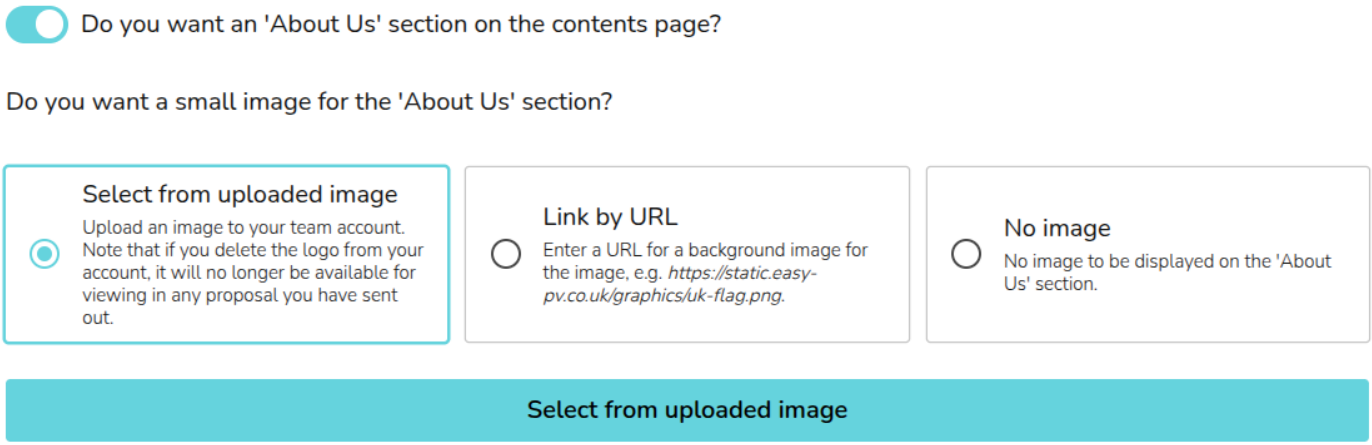
Make sure the footer text does not overflow onto a second line when you generate the proposal or this will cause formatting errors.

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.



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.



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:

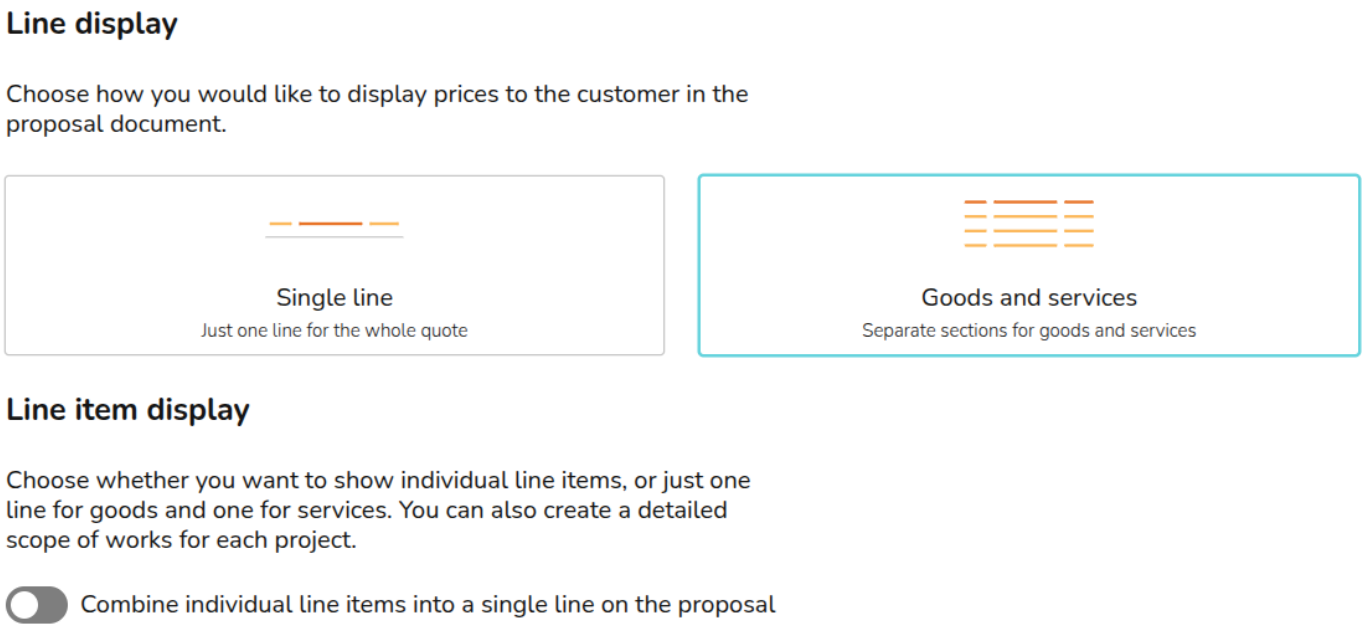
image.png
Image not found or type unknown

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

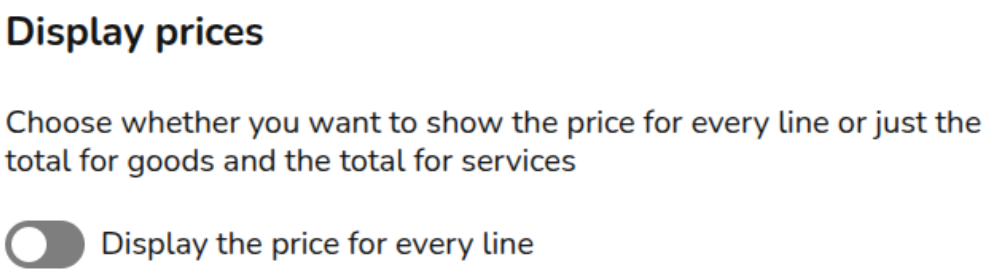
> Changes made to the contents page, terms and conditions and scope of work will **not** automatically refresh in projects where you've already opened the customer proposal task. Click the refresh icon next to where it says 'Customer proposal' to reset those fields to what you've got in your settings.

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.



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



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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’**.

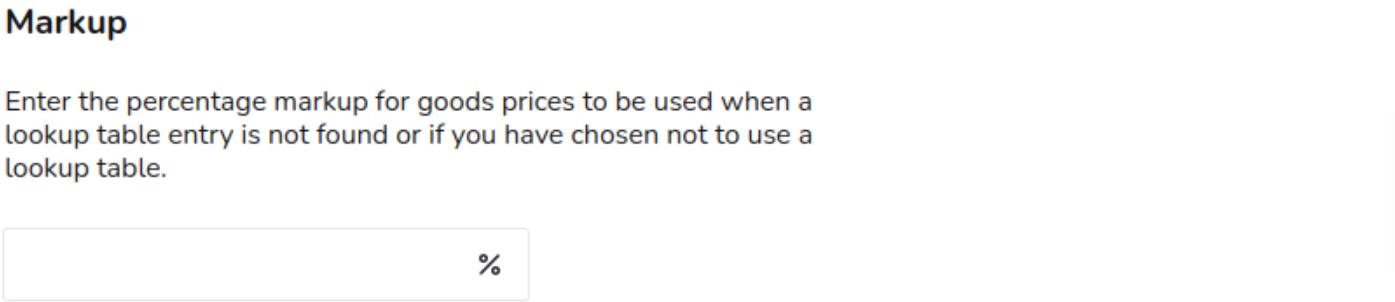
Configuring pricing for your projects

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.



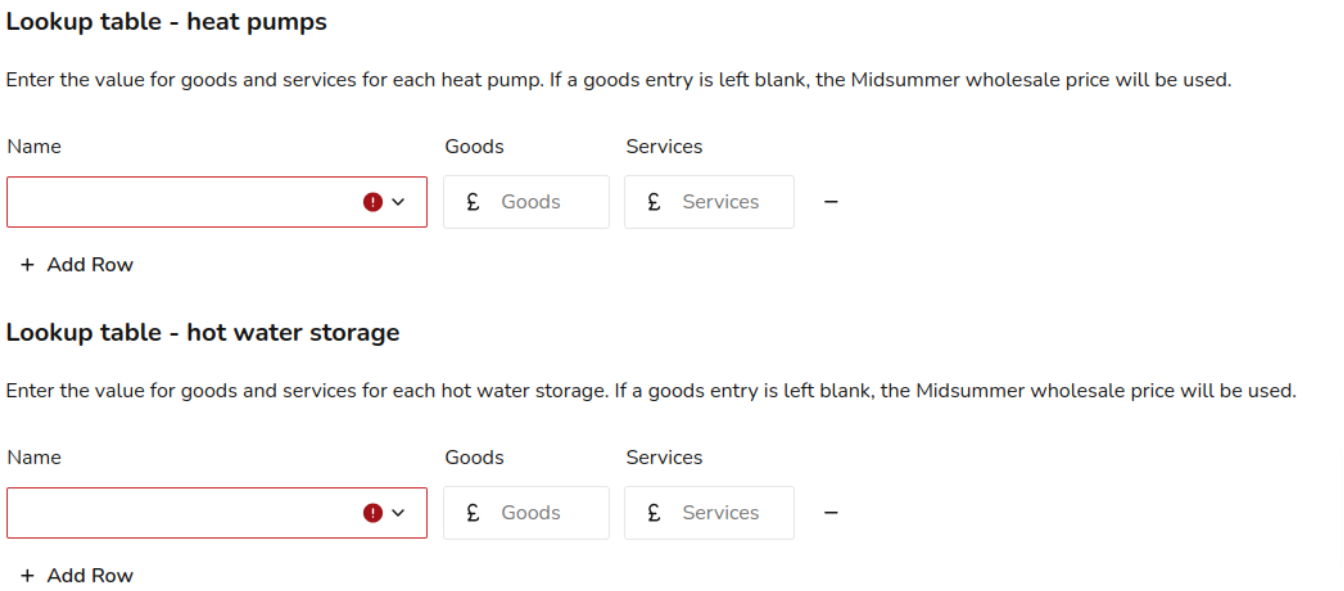
This will apply the specified markup to your Midsummer wholesale price. Ensure your wholesale account is connected, otherwise retail wholesale prices will be applied. See our guide on

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.

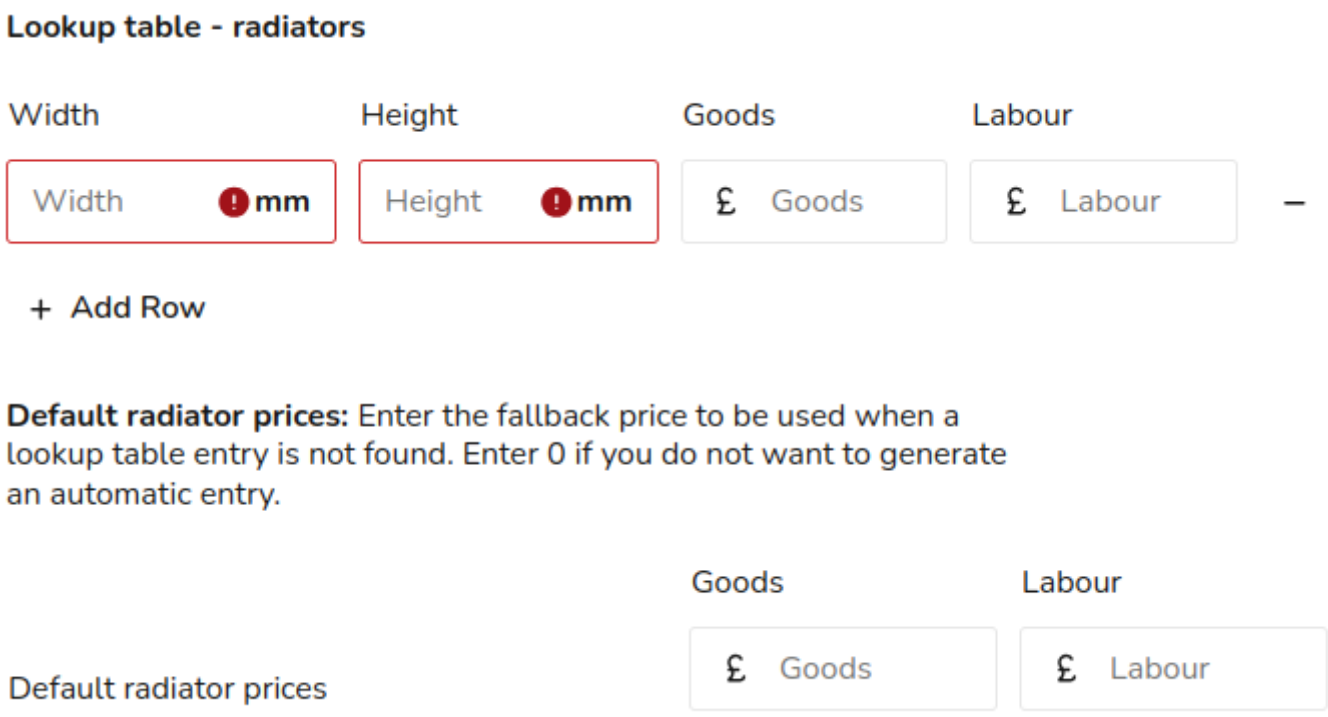


Lookup tables are most useful if you install just a few different system combinations. If you use a wide range of kit, it's probably more efficient to use the 'markup' method. Lookup tables also require additional maintenance as the component prices will not change automatically with costs.

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.



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

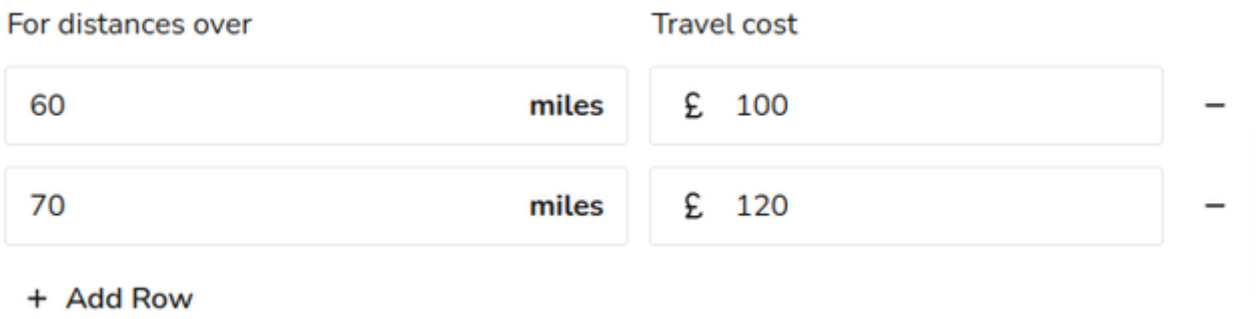
These items will be prompted for addition at the start of the Financial task. Examples include an extended warranty or replacement of microbore pipework.

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.



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