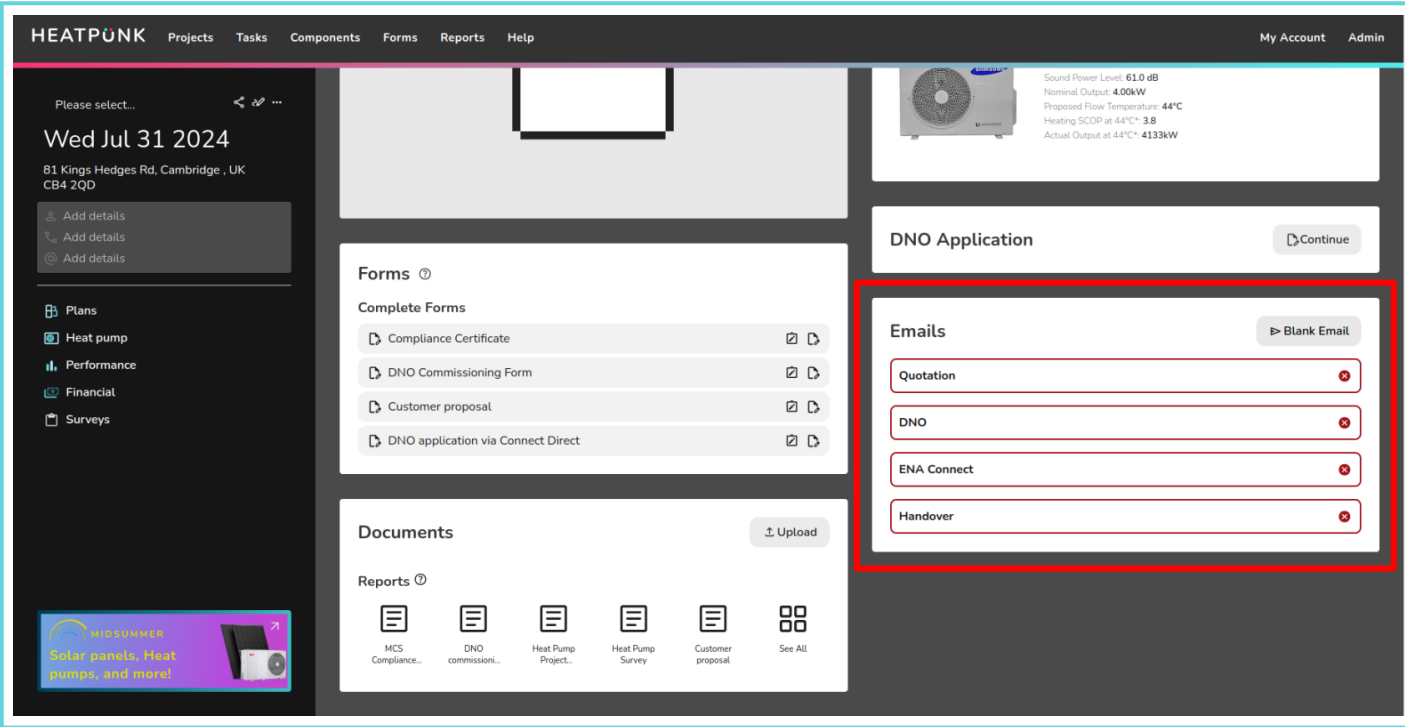


# Pro: Videos and guides

- [Emailing](#)
- [E-signing](#)
- [Create and manage your own components](#)
- [Importing floor plans](#)

# Emailing

You can access the email management section via the project overview. Here you can keep track of emails that have been sent.



## Editing and sending an email

### Send Email

To

+ Bcc

Cc

daisy.kernick@midsummerenergy.co.uk

Subject

Heat proposal for 81 Kings Hedges Rd, Cambridge , UK

Dear customer,

I'm pleased to share a proposal for a heat pump system at 81 Kings Hedges Rd, Cambridge , UK. Our recommended system will help you save money on your energy bills over the lifetime of the system and contribute to a greener future. If you have any questions or need further clarification, feel free to reach out to us.  
Thank you for considering our proposal.

Kind regards,  
Daisy Kernick  
**Midstallations**

↶ ↷ **B** *I* U ↺ ↻ ☰ ☷

Cancel

Send

Quotation Document Required Attachments:

Quotation:  
*Quotation incomplete* →

📎 Add attachments

Using the Quotation email as an example, when you click on the **Quotation** email option it will open a modal like the one shown above. The the customer’s email address will automatically be filled (if it has been added to the project). Your email will populate in the ‘Cc’ field.

The quotation will be automatically attached to the email if it was saved to the file management section. You can add other attachments and then click **Send** when you are ready to send.

## Adding additional attachments

You can add additional files to the email by clicking **Add attachments**. Please note you will only be able to upload files you previously uploaded/saved to the file management section or component management section.

**Important:** Please note that if you send the quote to the customer via this method, it will be sent as a PDF attachment. Follow the instructions [here](#) to send documents for e-signing.

# E-signing

The e-signing functionality makes it quick and easy to get important documents signed by your team or customer.

## Send a document for e-signing by email

Navigate to the report you want to send for signing via the Reports drop-down in the main site navigation. **Click the send for signing button** outlined in red in the screenshot above. This will open the send for signing modal. You can edit the email as you'd like and then **click Send**. The recipient will receive the email which will include a link for them to review and sign the document.

Heat pump  
**Proposal**

81 Kings Hedges Rd  
Cambridge  
UK  
CB4 2QD

← Project Overview

Customer proposal

Customise your customer proposal for a heat pump installation.

**Include Sections:**

- Cover
- Contents
- Your system
- Heat pumps explained
- Sound check
- Quote
- Appendix - Heating Check
- Appendix - Materials
- Appendix - Hot Water Calculations

0/1 Customer Signatures

Save

## Signing a document

When viewing a document that requires e-signing, the customer (or your team members) can **click the signature field** and then enter their name, the date, and their signature. They must tick the box to indicate they agree to the contents of the document.

### Signature

name

Daisy Kernick

date

06/08/2024



Clear

☒ I agree to the use of electronic signatures to authorise this document.

Cancel

Submit

After the document is signed after being sent via email, the recipient will receive an email with the signed document attached and you will receive an email confirming that the recipient has signed the document.

## View a signed document

To view the signed version of the document, **navigate to the document via the reports drop-down** in the main navigation. The signed version of the document can be loaded by selecting the version you want to view.

HEATPUNK

ProjectsTasksComponentsFormsReportsHelp

Please select...

Wed Jul 31 2024

81 Kings Hedges Rd, Cambridge , UK  
CB4 2QD

Add details

Add details

Add details

MCS Compliance Certificate

DNO commissioning form

Heat Pump Project Design

Heat Pump Survey

Customer proposal

ENA Connect Direct

# Create and manage your own components

In this guide, we will detail how to upload 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.

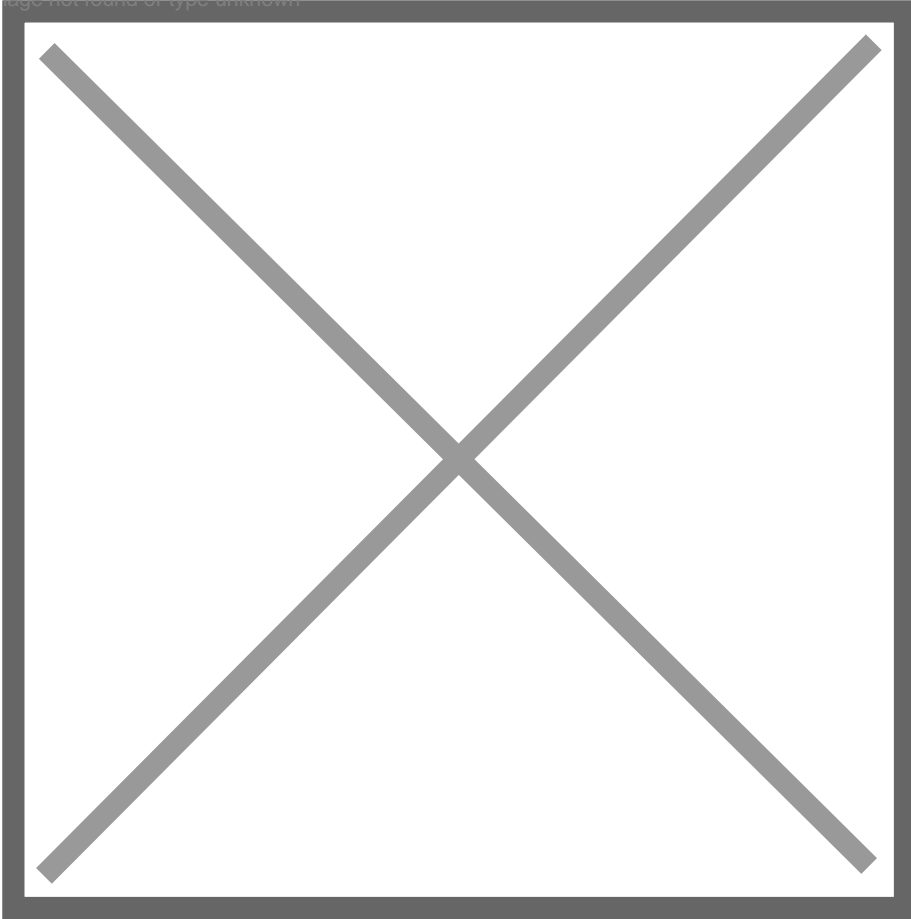
If you require assistance reading technical information from a datasheet, please contact the manufacturer directly. This is not something we can provide significant support with since these will not be products Midsummer sells.

**NOTE:** Custom components are located in a separate database to standard Heatpunk. As a Pro customer, you and your team are responsible for uploading and maintaining your own components.

## Manage components

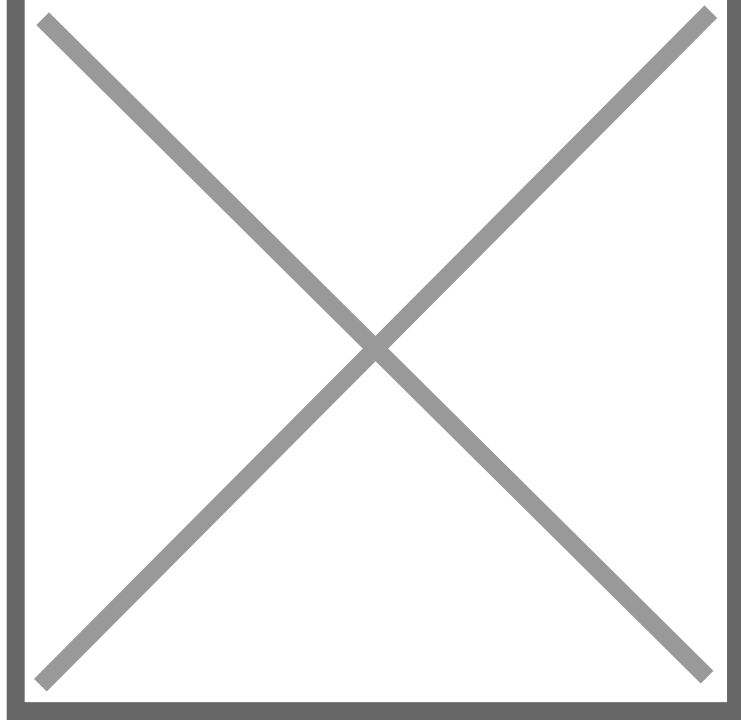
You can access the Component Menu from the Heatpunk home page or from the navigation bar at the top of the site.

Image not found or type unknown



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

Image not found or type unknown



Below, you'll find full instructions on how to add/manage each type of component.

## Heat pumps

### Creating manufacturer

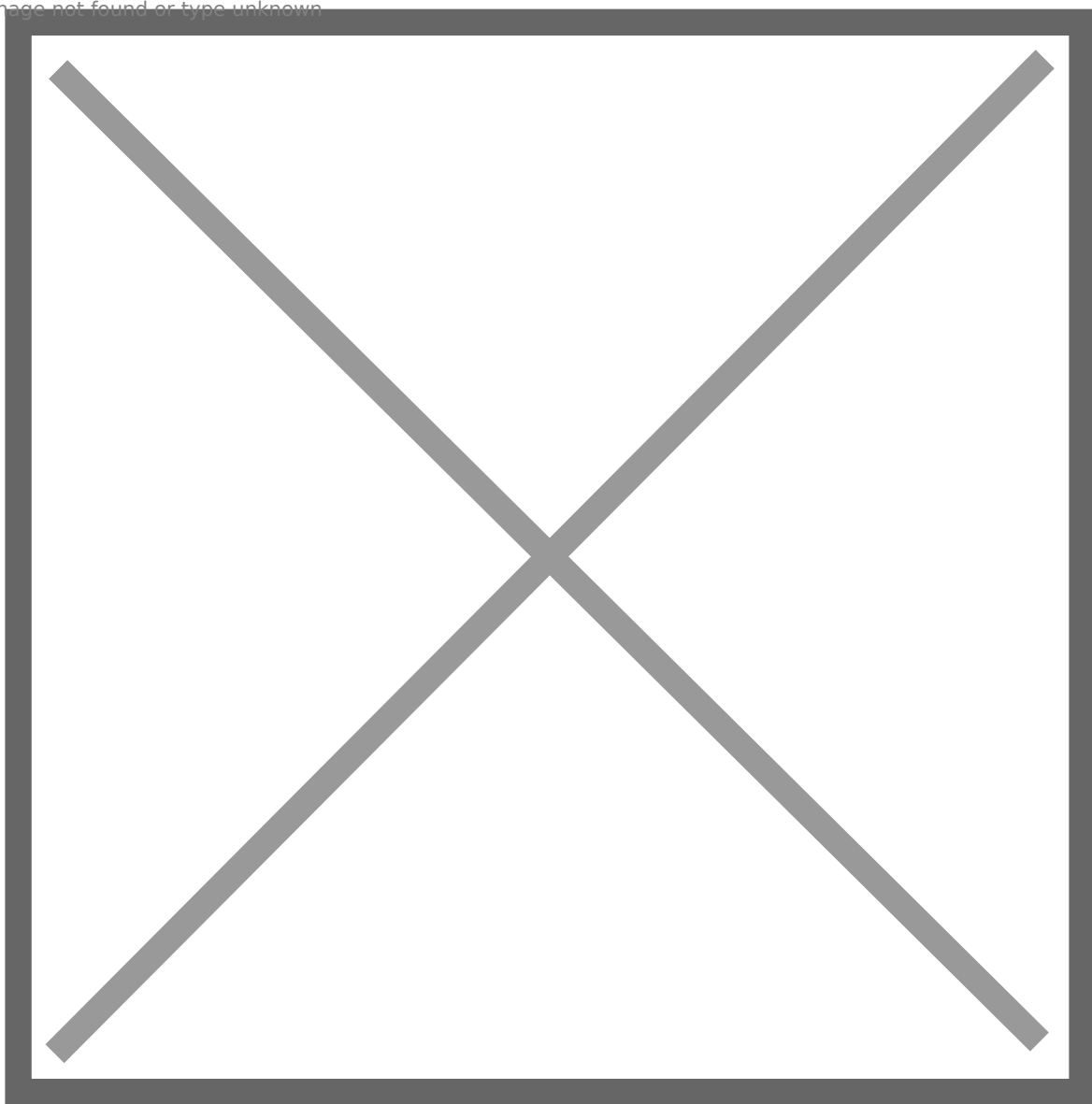
When adding any custom heat pump in Heatpunk you first need to add a custom manufacturer category which allows you to organise your custom components. The components added will be categorised by their manufacturer when it comes to select them in a project.



Image not found or type unknown



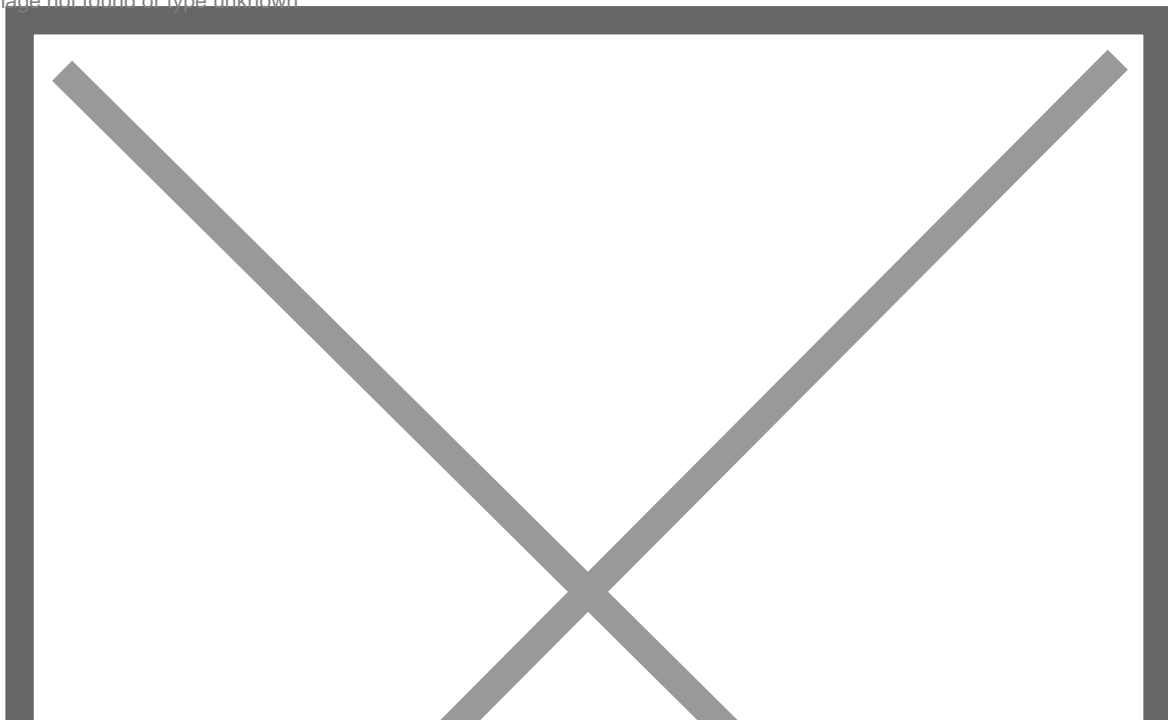
Image not found or type unknown



### Inputting information from datasheet

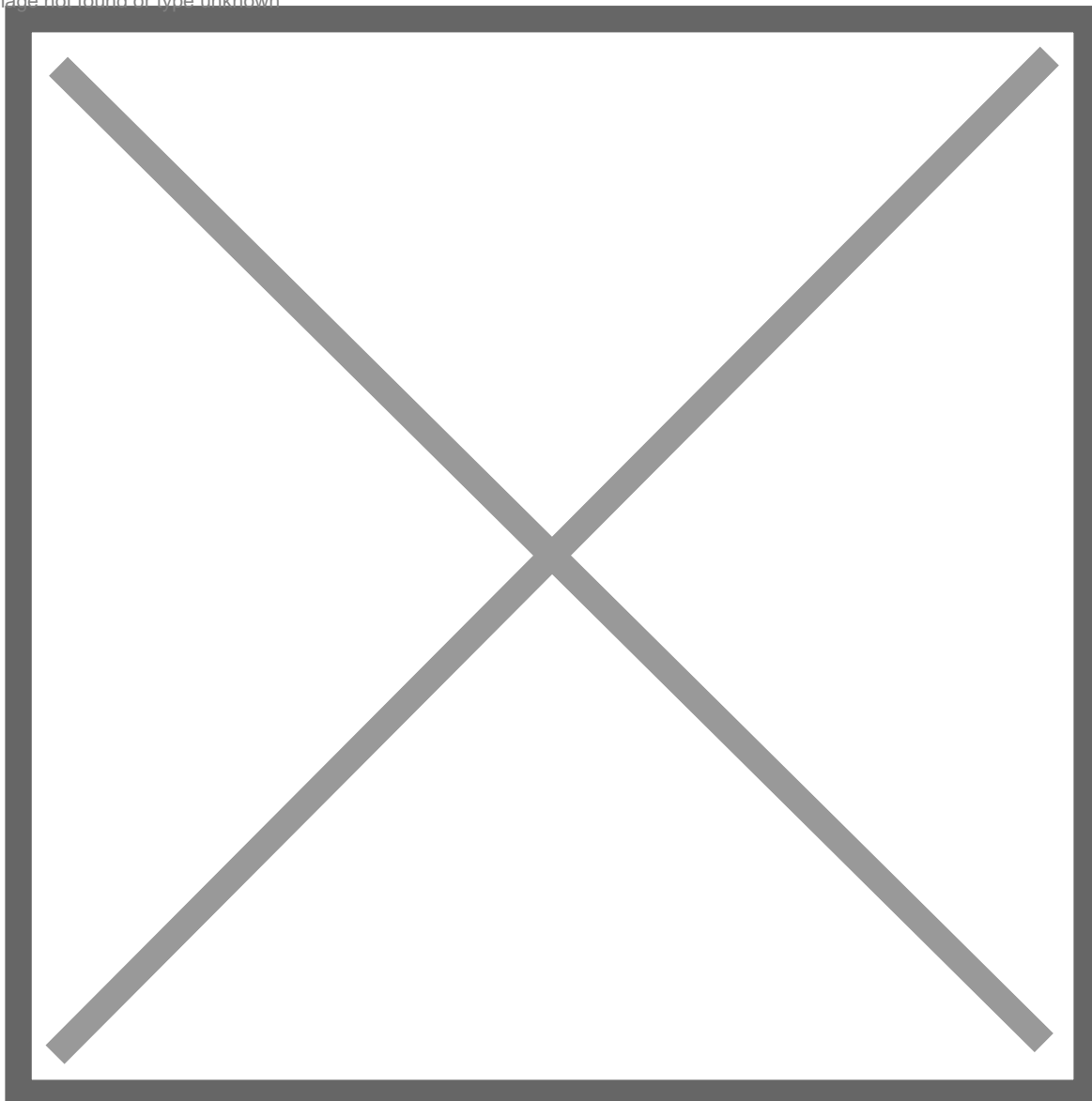
After inputting the name for the manufacturer, re-open your custom manufacturer and you will see additional options to add a heat pump.

Image not found or type unknown



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

Image not found or type unknown



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

Technical info	Details
Nominal output	<ul style="list-style-type: none"><li>• Units: kW</li></ul>
Sound power level	<ul style="list-style-type: none"><li>• Units: dB</li><li>• This should be measured in accordance with EN12102</li></ul>

ENA system reference	<ul style="list-style-type: none"> <li>This can be found on the <a href="#">ENA Heat Pump Register</a></li> </ul>
Power factor	<ul style="list-style-type: none"> <li>This will autopopulate as 1. You should edit as necessary</li> </ul>

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

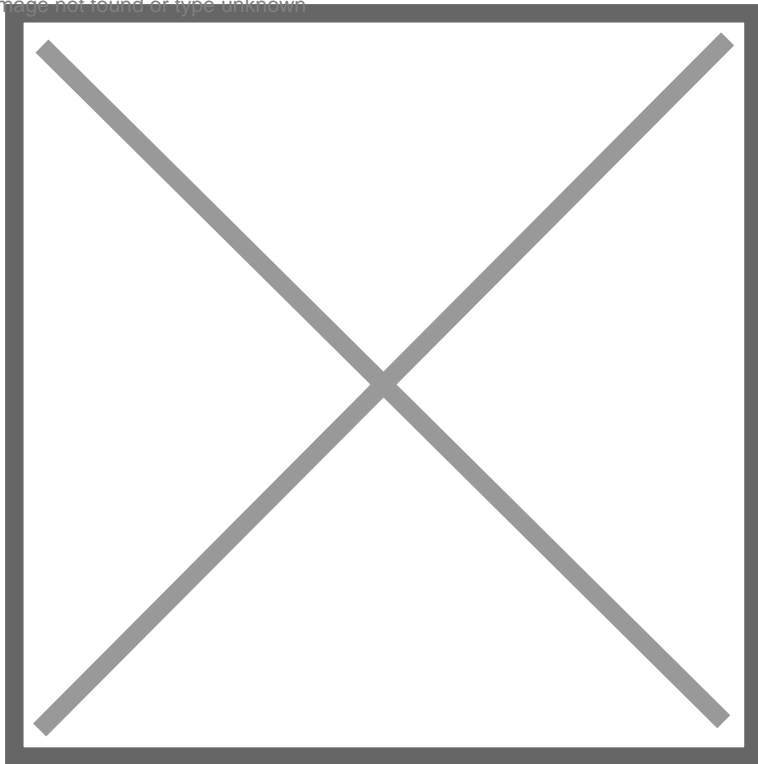
You should also add SCOPs and Output Powers. Without this information Heatpunk can not perform the required calculations.

### **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.

Image not found or type unknown



### 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 -10°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.

### 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

Customer Manufacturer

Not used in any projects

Name: Customer Manufacturer

Description: description

Type: Standard

Admin Standard

Access: Pre-plumbed

Slimline

Slimline Pre-plumbed

Horizontal

Stacked

[+] Add 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

m<sup>2</sup>

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	<ul style="list-style-type: none"> <li>Units: L</li> </ul>
Weight (empty)	<ul style="list-style-type: none"> <li>Units: kg</li> </ul>
Weight (full)	<ul style="list-style-type: none"> <li>Units: kg</li> </ul>
Height	<ul style="list-style-type: none"> <li>Units: mm</li> </ul>
Width	<ul style="list-style-type: none"> <li>Units: mm</li> <li>Enter diameter if cylindrical.</li> </ul>
Length	<ul style="list-style-type: none"> <li>Units: mm</li> <li>Enter diameter if cylindrical.</li> </ul>
Standing heat loss	<ul style="list-style-type: none"> <li>Units: kWh/24h</li> </ul>

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

- Coil size (m<sup>2</sup>)
- 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.

# Importing floor plans

A step by step guide to the importing plans feature in Heatpunk.

*This feature is only accessible with a Heatpunk Pro subscription.*

1. Click 'New Project' to launch a project as standard, setting the customer details, build date (affects ventilation rates used) address for the property.

**New Project**

Project Name  
Mon Nov 25 2024

Customer Name

Customer Phone

Customer Email

Build Date  
Pre 2000

Address

Postcode

Set from address

Set from map

Map Satellite

Google

Keyboard shortcuts | Map data ©2024 GeoBasis-DE/BKG (©2009), Google Imagery ©2024 TerraMetrics | Terms

Create

2. Choose your material palette: select from your own user or team palettes, Heatpunk defaults or start from fresh with the blank project palette to set the construction type (u-values) for all the building elements.



3. Set default ceiling height and the floor name

**Level Description**

Fill out the details for this level. Add or edit the level name, and enter the default ceiling height.

Floor Name

Room Ceiling Height  mm

4. Once at the start, on the building stage in the plans task, click on the 'Plan' Icon on the left hand side of the page:



5. Choose a PDF file to upload:

## Upload Plan

Please upload the file containing the architectural plan you wish to take measurements from.

Once you're done, resize the reference length included to scale the image appropriately. To set a new scale, click the length pop up and enter your desired sizing.

Files must be in .pdf format

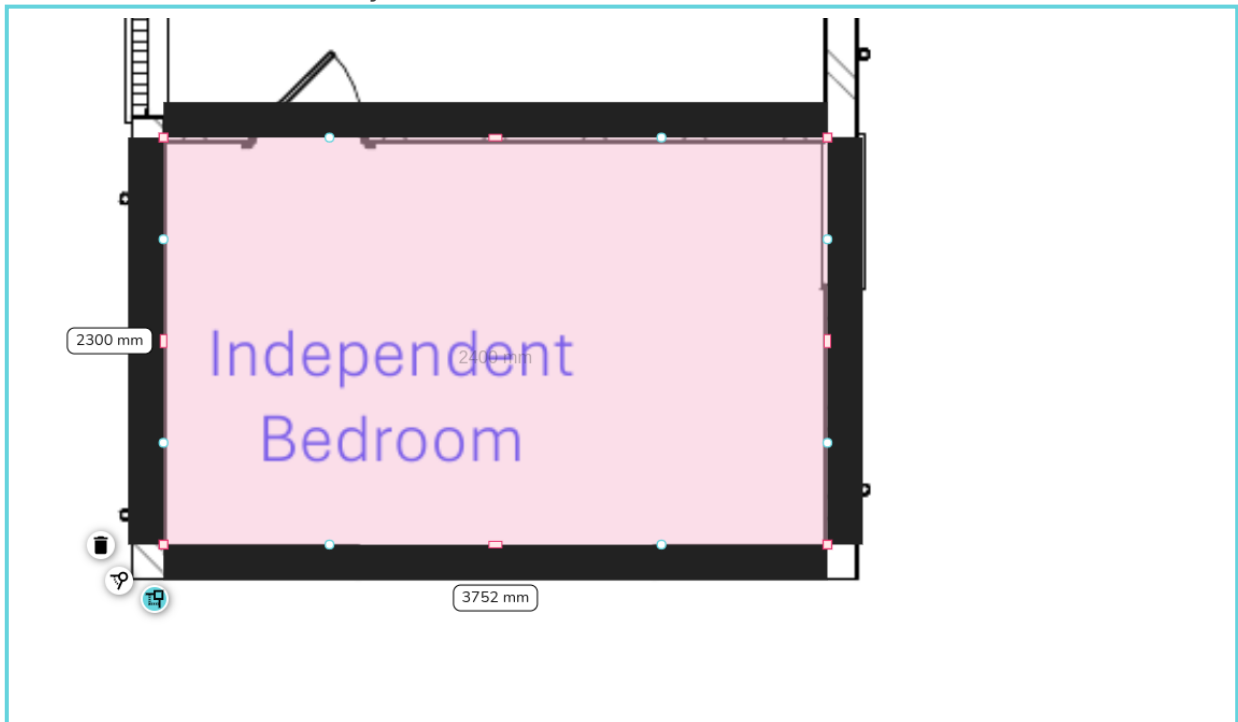
File	Page Number
<div>Choose file No file chosen</div>	<div>1</div>

Upload Plan

6. Use the purple reference length bar to set the scale: drag the reference length bar over to the plans scale or an object of known length. Set the size to match and then click on the dimension to enter the relevant value. Ex: below the scale represents 5m, I've set the purple ref length bar against it and set it's dimensions to 5m.



7. Start adding in the rooms: you can drag on your rooms as you normally would in Heatpunk, but now you can overlay them onto the background plans. Once you've aligned the walls will automatically scale to be the correct size.



8. Continue adding rooms to build up your floor plans. Clicking to the side of rooms, or on walls will turn off the transparency and allow you to see the rooms as normal to select wall type, room type, etc. Clicking a holding for 2 sec on the room will turn it back to the transparent mode so you can see the plans behind again.



9. Once you've done your ground level, you can add in a level above. When you add a new level, click the 'Plan' button to import the relevant PDF.
10. Once your plan is uploaded you will need to align this with the rooms below. To do this, double click on the plans to select them, once selected you can move them. As you move the plans they will become transparent allowing you to see the outline of the rooms below. This should allow you to line up the plans correctly.
11. Then it is just a case of checking your scale is still correct (if the two PDF's have the same scale it should already be correct), and then continuing to create your plans.
12. Once you've finished, you can set wall types, room types, add windows, doors and existing rads before proceeding to the heat pump task.