

# Pro: Videos and guides

- [Pro account settings](#)
  - [Pro Team Management](#)
  - [Automatic pricing](#)
- [Create and manage your own components](#)
- [Survey task](#)
- [Document Management](#)
- [Sending emails from Heatpunk](#)
- [E-signing](#)

# Pro account settings

# Pro Team Management

Team management allows you to have control over who is on your Heatpunk Team and the role type they have. The team **Owner** and any users with the **Admin** role type can add and remove users as well as change their role type.

HEATPUNK Projects Tasks Components Forms Reports Help

Home  
New Project  
My Projects  
My Material Library  
My Components  
My Account  
User Management  
**Pro Account Settings**

## Team Preferences

General Email Proposal Automatic pricing Shrunk Punk

### Manage team members

Invite or add other Heatpunk users to your team. If you want to remove a user from your team you can, but you'll lose access to any projects that user has shared with you or other team members.

Team Name  
Midsummer Heatpunk Pro T Edit

First Name	Last Name	Email Address	Role Type
ProElliot	Hobbs	elliott.hobbs+pro@n	Owner
Leo	Kelly (you)	leo.kelly@midsummr	Admin

+ Add User

### Company details

The details you set here will be automatically applied to forms and reports for all the users in your team.

Company Name  
Company Name

## Add and remove users

To add users, you'll need the individual's name and email address. You can **choose a user's role from the Role Type drop-down menu**. The Admin role includes the ability to manage team settings.

To remove a user, click on the icon beside the user. 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.

Admin

Admin

Standard

## Company details ▢

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

## Cancel your subscription ▢

To cancel your subscription, scroll to the bottom of the screen while in **Pro Account Settings**. Then click **Cancel Subscription**. This will cancel your subscription and your team's accounts will switch back to standard access.

# 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.



**Markup**  
The cost of materials plus a set percentage



**Lookup Tables**  
Set specific prices for each heat pump and hot water storage

### 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
<input type="text"/>	£ Goods	£ Services -
<a href="#">+ Add Row</a>		

### 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
<input type="text"/>	£ Goods	£ Services -
<a href="#">+ Add Row</a>		



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



# 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.

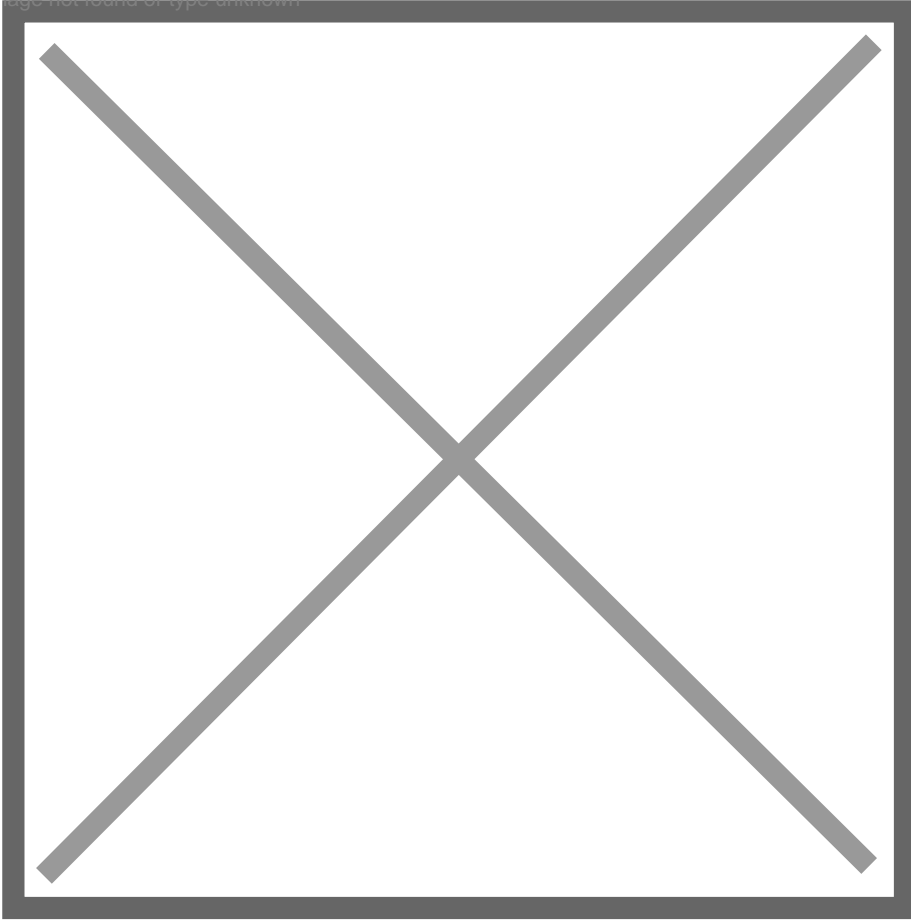
If you require assistance reading technical information from a datasheet, please contact the manufacturer directly. This is not something we can provide significant support with since these will not be products Midsummer sells.

**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

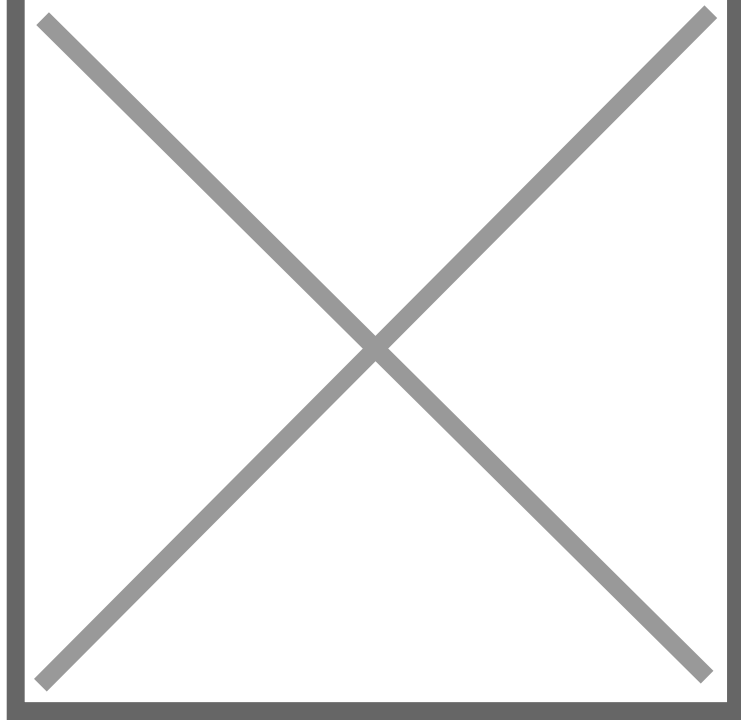
You can access the Component Menu from the Heatpunk home page or from the navigation bar at the top of the site.

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

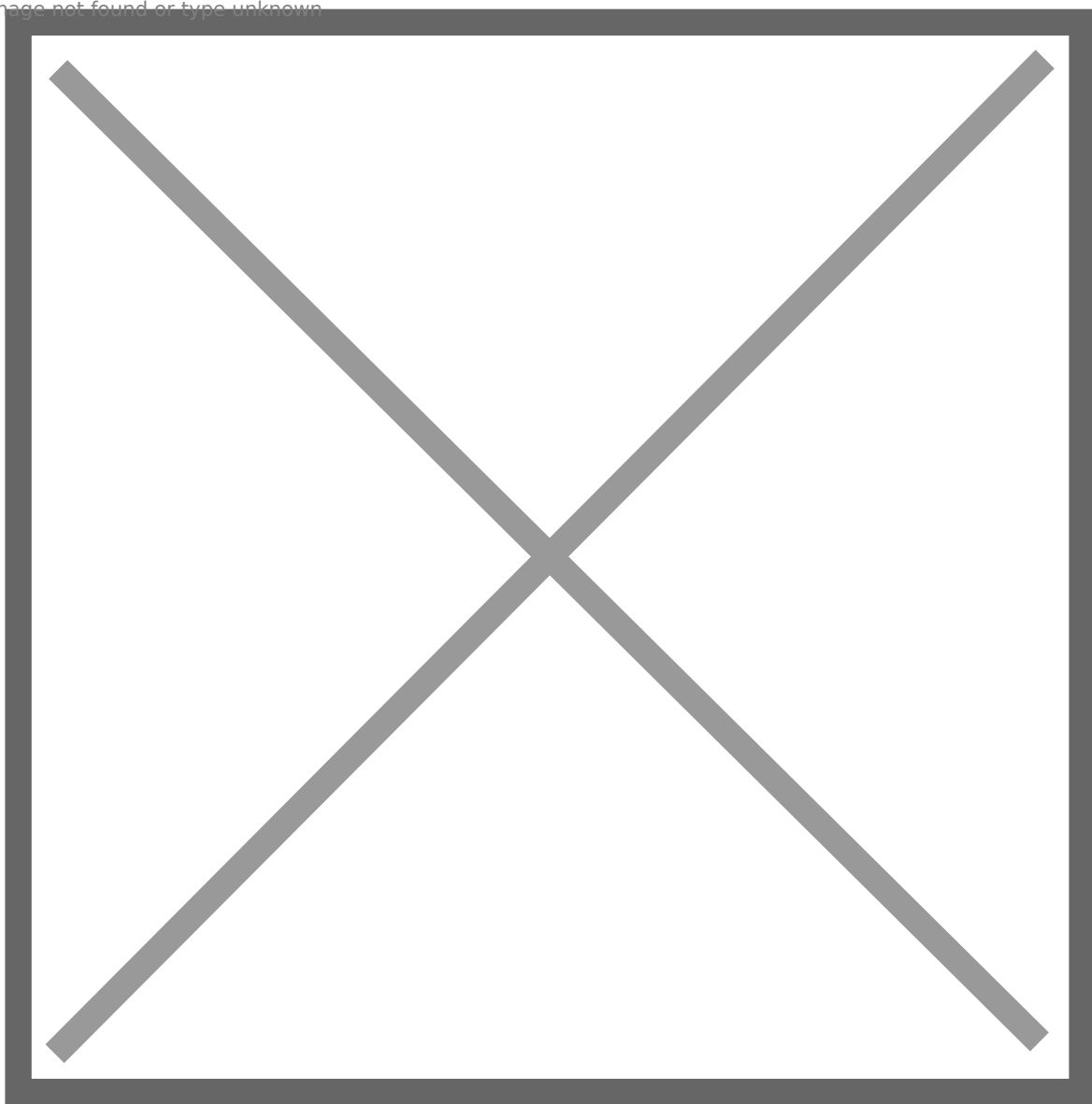
### Creating manufacturer

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



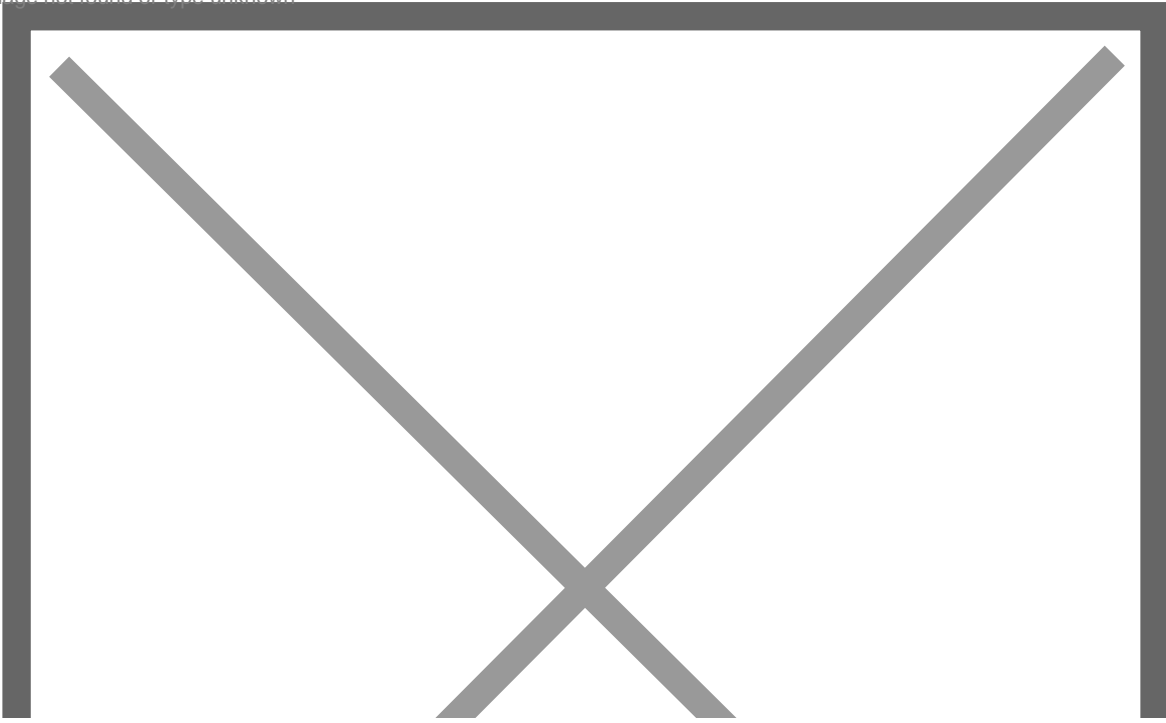
Image not found or type unknown



### Inputting information from datasheet

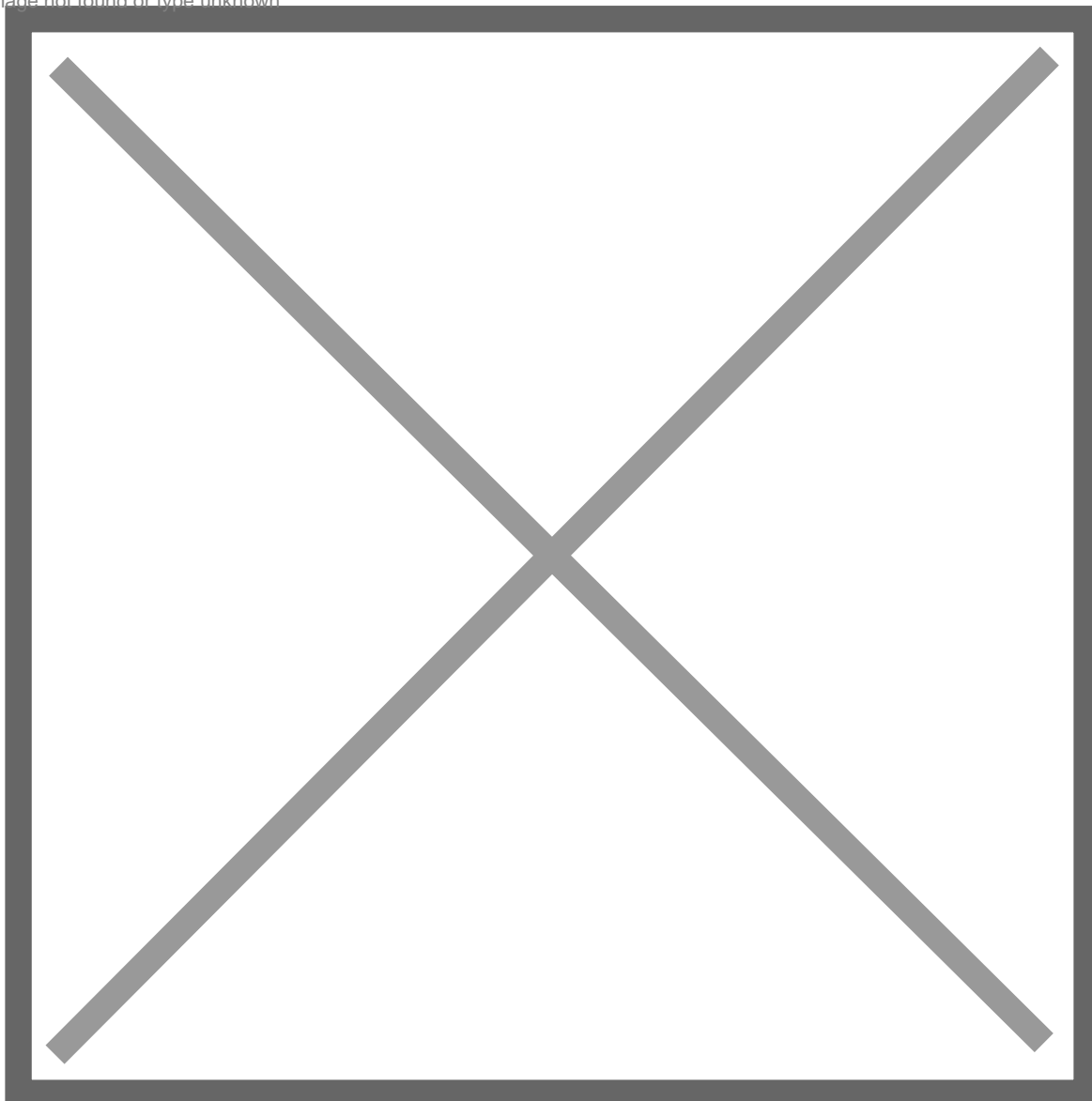
After inputting the name for the manufacturer, re-open your custom manufacturer and you will see additional options to add a heat pump.

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.

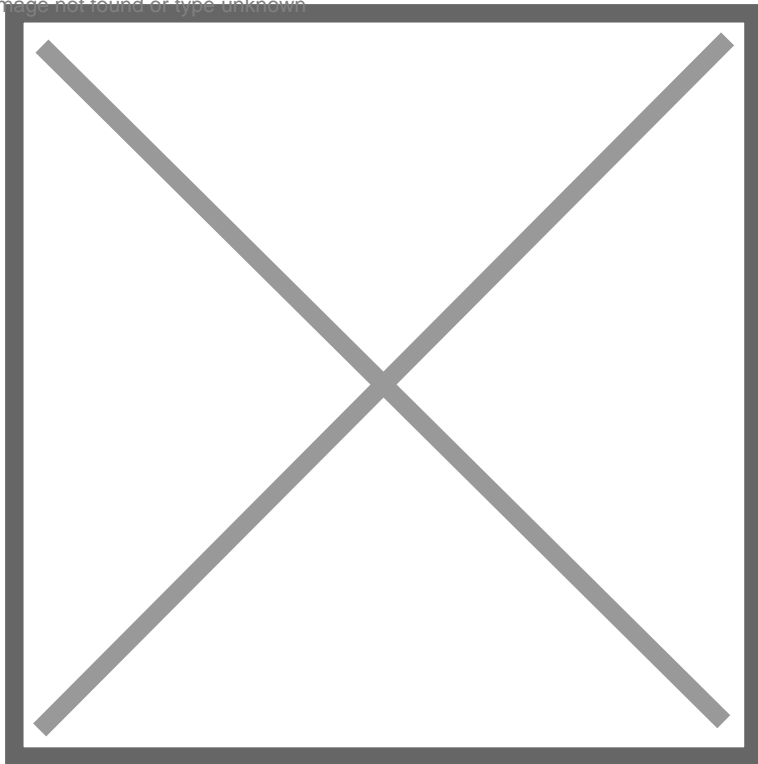
You should also add SCOPs and Output Powers. Without this information Heatpunk can not perform the required calculations.

### **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.

# Survey task

The survey task allows the surveyor to enter all information required to plan out the installation in one location. Surveyors can answer the questions and add additional comments. They can also upload images and apply image annotations. A PDF report of the survey can be generated from the reports drop-down in the main navigation.

## Accessing the survey task

From any project, click on the **Tasks** option in the main navigation menu, then select **Surveys**.

## Filling out a survey

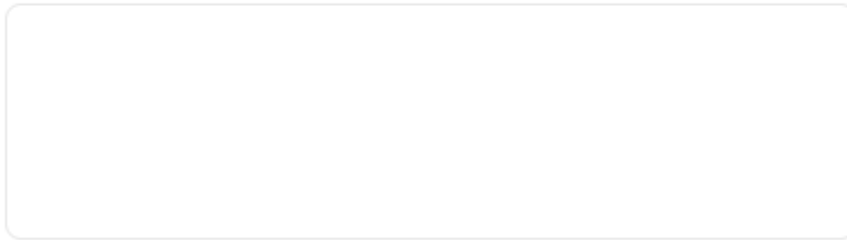
The survey is divided into sections that can be viewed and navigated between using the right-hand menu.

The screenshot shows the HEATPUNK web application interface. The top navigation bar includes the logo and links for Projects, Tasks, Components, Forms, Reports, Help, My Account, and Admin. The main content area is divided into two panels. The left panel, titled 'Property Details', contains two questions with radio button options: 'Is the property in a conservation area or heritage site?' (Yes/No) and 'Is the property listed?' (Yes/No). Below these is a section for 'Images of the outside of the property' with an 'Upload Images' button and a note 'JPEG, PNG'. The right panel, titled 'Survey', features a list of sections: Access, Proposed Heat Pump Location, Existing Heating System, Domestic Hot Water Supply, Proposed cylinder location, Energy Use, Electrical System, Wiring route, Pipe runs, and Additional information. At the bottom right, there are three buttons: 'Exit', 'Next', and 'generate pdf'.

## Uploading an image

## Access

### Description of parking arrangements



### Images showing parking arrangements



There are various locations throughout the survey where pictures can be uploaded and annotated.

**Click on the Upload Images box** and it will bring up the option to upload a picture from your files. If you are on a mobile or tablet device it will give you the option to take a photo. You can repeat this step to add multiple images.

## Adding annotations to your images

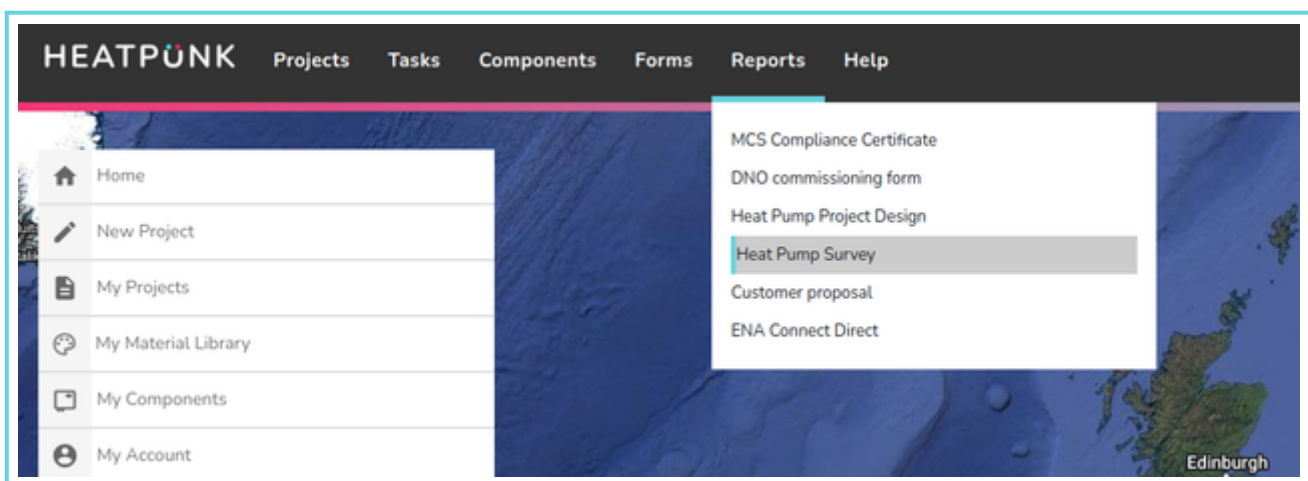
Once the file has been uploaded, you can **click on the picture to bring up the annotation options**.

- Use the *bin* button to delete annotations or the whole image.
- The *cursor* lets you select annotations you have added to the image.
- The *pencil* allows you to draw or write free-form.
- The '*T*' is used to create a text box.
- The *arrow* lets you draw an arrow.
- The *colour box* is where you can change the colour of annotations.
- The *tick mark* saves your annotations and exits the annotations editor.

The green bar at the left indicates which tool you are currently using.



## Accessing your survey as a PDF report



After the survey is complete, the report can be found in the 'Reports' drop-down. Annotated images, question responses, and an image of the roof layout will be carried forward to the survey report.

Note that heic files (usually from mobile devices) are not supported at this time. If your phone, tablet, or camera is set to save pictures in this file format, please change this to save .jpg files in settings.



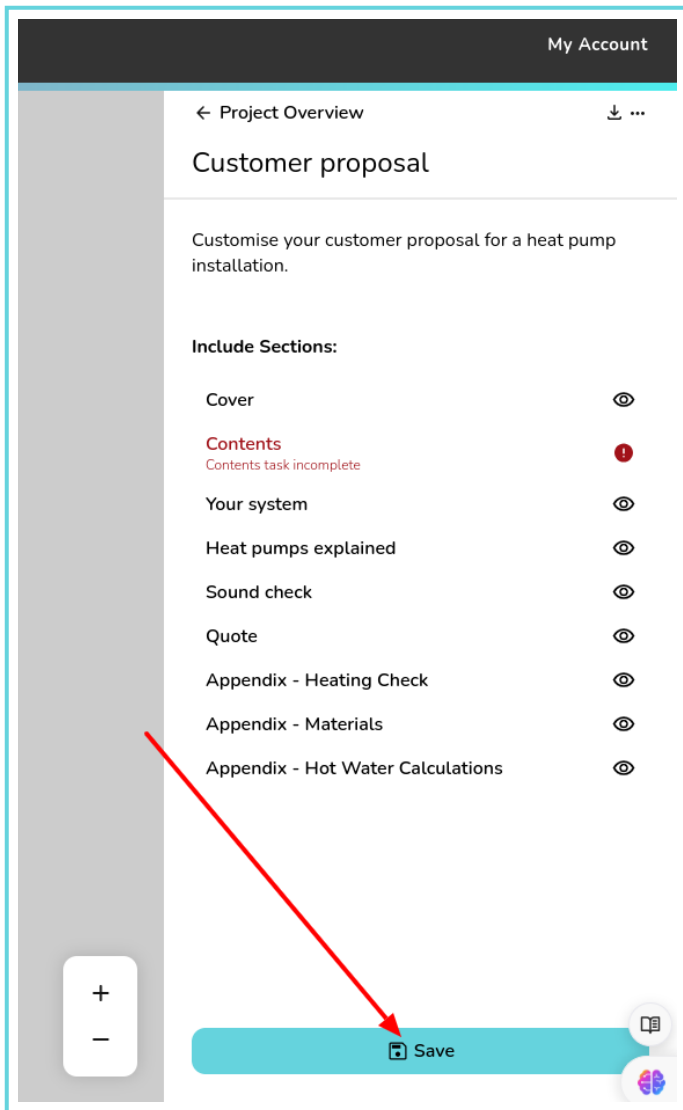
# Document Management

The document management section can be found at the bottom of the project overview. It allows you to keep track of all the documents you need for a project in one place.

The screenshot displays the HEATPUNK project overview interface. The top navigation bar includes 'HEATPUNK', 'Projects', 'Tasks', 'Components', 'Forms', 'Reports', and 'Help'. The left sidebar shows a date 'Fri Dec 15 2023', user 'HUB 8DE', and contact 'MKM' with phone '01844 896444' and email 'fio.osmani@mkmb.co.uk'. Below this are links for 'Plans', 'Heat pump', 'Performance', 'Financial', and 'Surveys'. The main content area features a floor plan, a 'Forms' section with 'Incomplete Forms' (Compliance Certificate, DNO Commissioning Form, DNO application via Connect Direct, Customer proposal), and a 'Documents' section (highlighted with a red box) containing 'Reports' (MCS Compliance, DNO commissioning, Heat Pump Project, Heat Pump Survey, ENA Connect Direct, See All) and an 'Upload' button. The right sidebar shows 'DNO Application' details (ENA Registration Number: SAMSG/09641/V1, Sound Power Level: 61.0 dB, Nominal Output: 5.00kW, Proposed Flow Temperature: 44°C, Heating SCOP at 44°C: 3.63, Actual Output at 44°C: 4579kW) and an 'Emails' section with links for 'Quotation', 'DNO', 'ENA Connect', and 'Handover'.

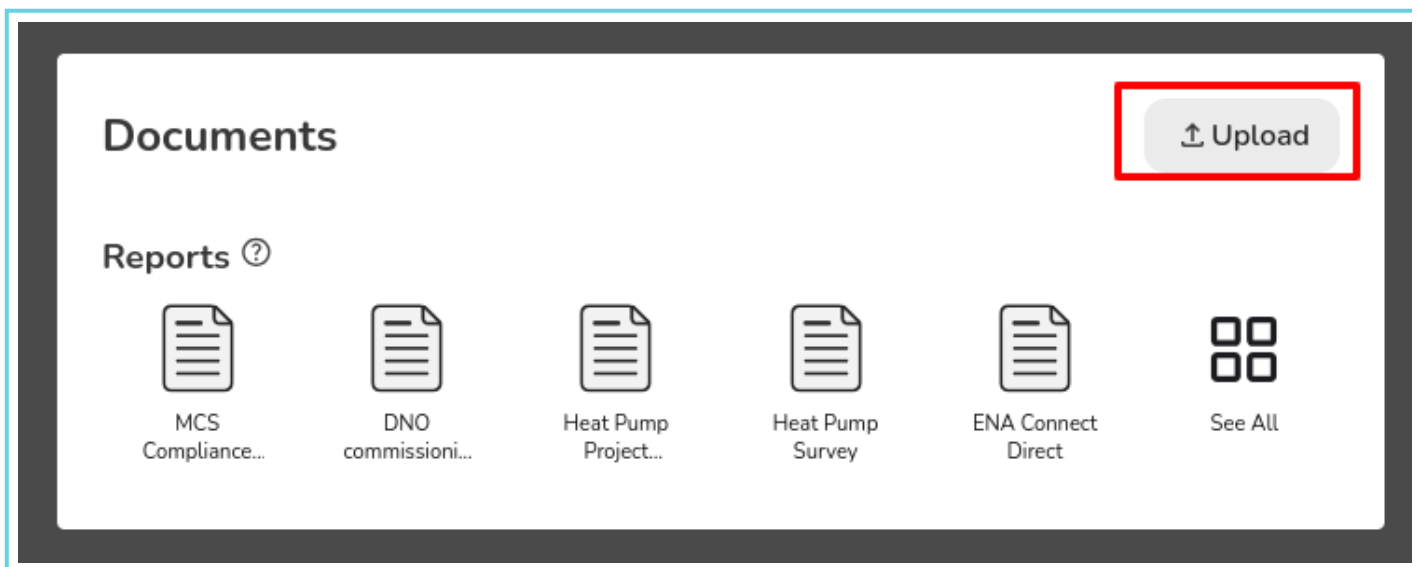
## Saving a Heatpunk report to the document manager

Let's use the quote as an example of how to save a document to the document management section. When previewing the customer proposal report, you will see a **menu on the right-hand side with a save button at the bottom**. After clicking the save button, you can go back to the Project Overview and see that the quote has been saved to the document section.



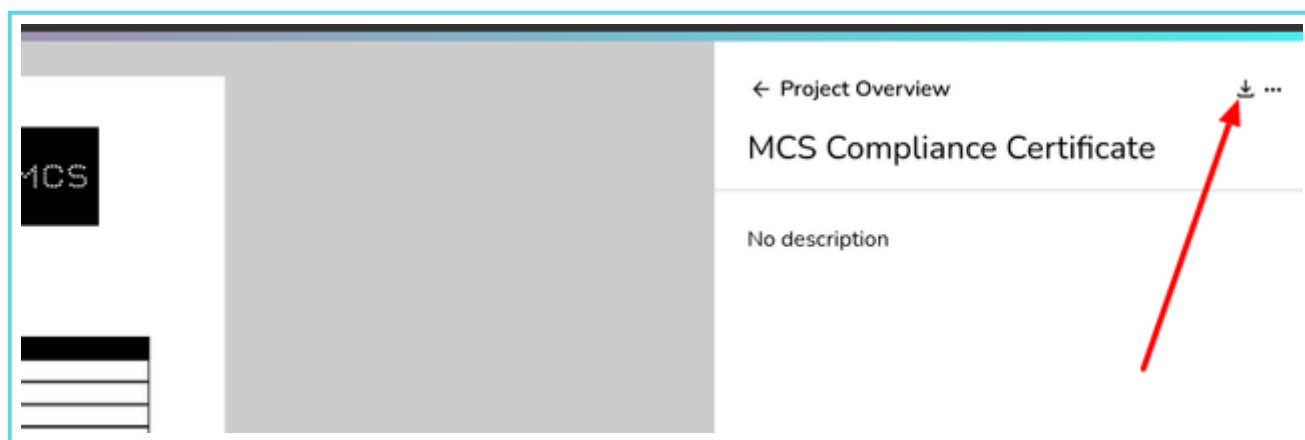
## Upload a document from your device

To upload a document from your device, **click the Upload button**. Then drag and drop the file, or use the **Upload File** button to find the document you wish to upload.



## View, rename, download, or delete files you've saved to your project

If you'd like to download any of the files you've added to your project, go to the relevant document and click the **Download** button.

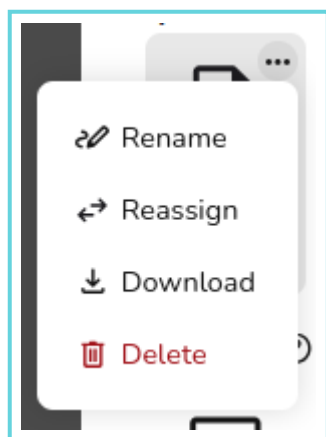


You can change the name of a file you have uploaded by clicking the three dots and choosing **Rename**.

To categorise your saved files, click the three dots and select **Reassign**.

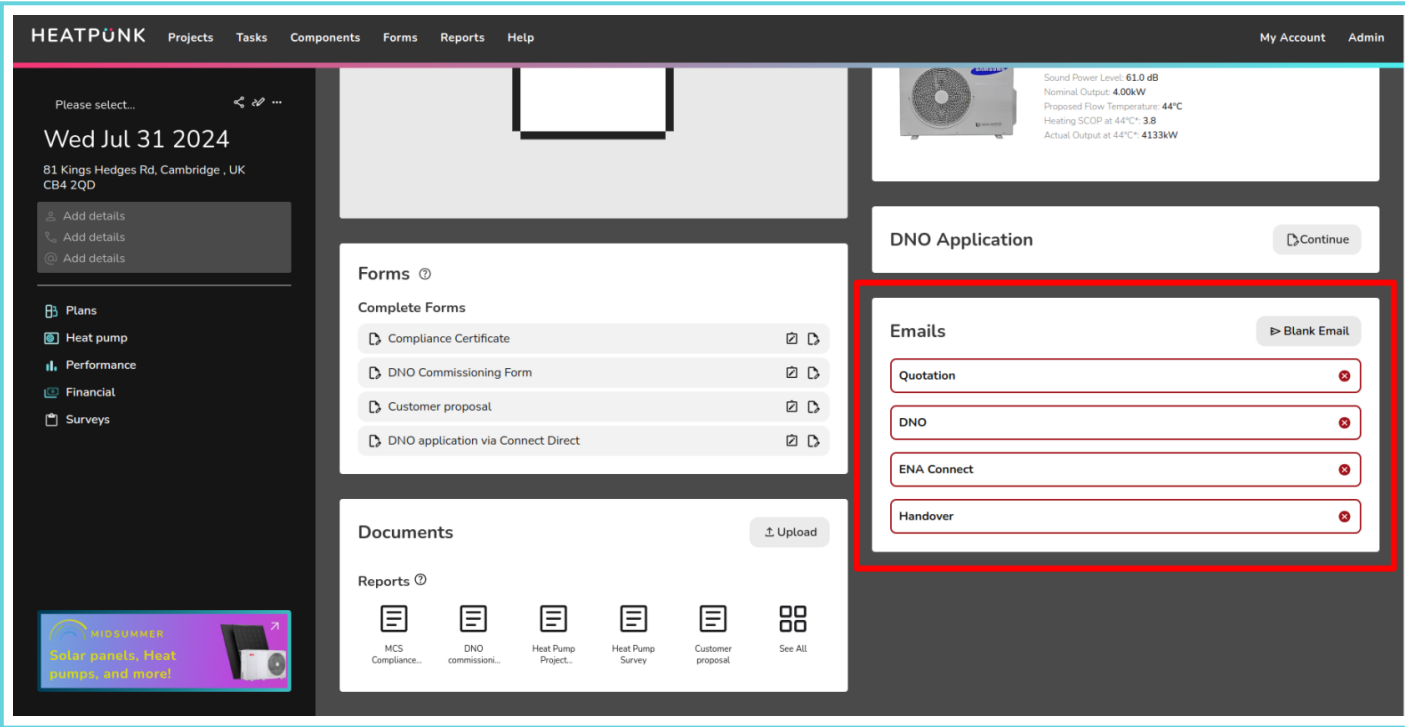
To download one of your saved files, click the three dots and select **Download**.

To delete a document, click the three dots and then **Delete**. This will delete the saved version of the document from the file management section of your project.



# Sending emails from Heatpунк

You can access the email management section via the project overview. Here you can keep track of emails that have been sent. Emails highlighted red with a cross have not been sent yet.



## 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. More information on this, see our guide on [Document Management](#).

**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 ▢

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

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. Your customers email will autopopulate (provided you have included this in your project) and you will automatically be Cc'd. 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.

### Send Email

To

installs@midstallations.co.uk

+ Bcc

Cc

harry.doyle@midsummerenergy.co.uk

Subject

Signing

Please follow [this link](#) to e-sign your document.

↶

↷

**B**

*I*

U

↺

↻

☰

☷

Cancel

Send

### Signing

Use the attachment tool to send any documents.

📎 Add attachments

## 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 via the link, 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. If you expect to see the signed document but cannot see a signature, check the right hand menu for a message saying there are multiple versions of this document and ensure you are viewing the signed document.

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