

Payment options

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

<https://www.youtube.com/embed/HKkju1dDYlo>

Creating a new payment option

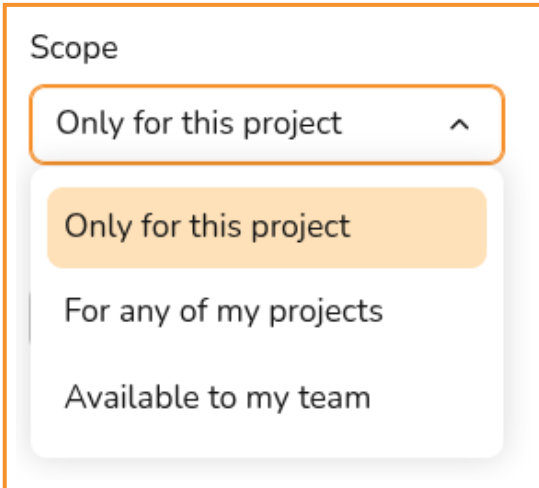
New payment options can be created within projects through the [financial task](#) on the **Payment tab** or by navigating to your [financial settings](#). Just click + **New payment option** and follow the steps outlined below.

1. Overview

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

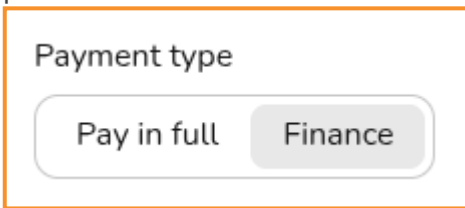
Name

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



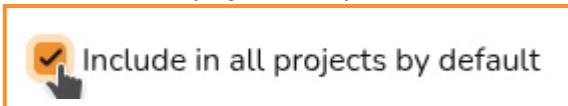
A screenshot of a dropdown menu titled "Scope". The menu is open, showing four options: "Only for this project" (highlighted in orange), "Only for this project", "For any of my projects", and "Available to my team". The first option has a small upward-pointing arrow to its right.

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



A screenshot of two buttons for "Payment type": "Pay in full" and "Finance". The "Pay in full" button is highlighted in orange, while the "Finance" button is greyed out.

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

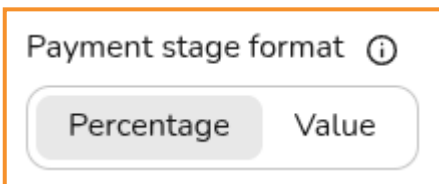


A screenshot of a checkbox labeled "Include in all projects by default". The checkbox is checked, and a mouse cursor is pointing at it.

2. Payment

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

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



A screenshot of two buttons for "Payment stage format": "Percentage" and "Value". The "Percentage" button is highlighted in orange, while the "Value" button is greyed out. An information icon (i) is visible to the right of the title.

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

selected, the final (or only) stage will be from 'Finance Payments'.

Stage name	Amount ⓘ	When payable	
Deposit	10 %	On accepting the... ▾	—
Stage 2	25 %	Before procuring... ▾	—
Final Payment	65 %	After handover ▲	

+ Add Row

Before procuring materials

Before installation

Immediately after installation

After handover

3. Finance

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

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

Finance provider + New provider

Example 1 User ▾

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

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

Repayment term Repayment frequency ⓘ

24 Months Monthly Annually

Repayment type ⓘ

Fixed Capital + interest

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

Loan interest rate Compounds ⓘ

0 % Monthly Annually

4. Disclaimer

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

Add custom disclaimer

Custom disclaimer

We estimate the system's costs and benefits over the lifetime of the system using the assumptions shown on the Financial Benefits page. Please review these carefully to ensure they reflect your circumstances. Actual returns may vary and depend on variables that cannot be predicted.

Editing existing payment options

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

Financial settings

Payment options and providers: Here you can see all your payment options and providers and create new ones. Click the pencil to edit existing options. The three dots menu will allow you to duplicate, delete, or hide any payment options or providers.



Duplicate

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



Delete

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



Hide

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

Within a project

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

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

If you have any additional questions about setting up payment options, please reach out at help@easy-pv.co.uk.

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