

Setting up your Automatic Pricing Calculator

This guide applies to the easy-pv.co.uk and easy-pv.ie versions of Easy PV. The information provided here may not be accurate for easy-pv.com.

With Easy PV you can configure pricing rules to automatically calculate project prices. Rather than having to amend and change your service costs on each project, you can spend time setting up your pricing rules so the automatic pricing calculator will do it for you.

Pricing settings can be accessed via **My Account > Preferences > Financial > Change pricing settings** or if you are part of a Pro team, the owner/admin can do this via **Pro Account settings > Financial > Change pricing settings**.

To turn off automatic pricing click on the **use pricing calculator** toggle. You can also switch between automatic pricing and manual pricing on a per-project basis via the financial task.

Configuring for your project

You can set material pricing based on the cost of materials plus a markup (best for complex pricing depending on the number of panels, roof dimensions, travel distance, etc.) or based on custom lookup tables (ideal for simpler pricing using only a few panels/inverters combinations).

On top of the cost of materials, you can set up additional charges for the delivery and installation. The installation cost can be further specified with costs for scaffolding, electrical, roof type, and travel to the site.

1. Choose if you use a markup or lookup table for calculating the cost of materials.
2. Tick the box for each additional cost you want to include in your pricing (information on configuring each of these is below).
3. Choose the format in which you want to display the price of goods in the quote.

Lookup tables or markup

Option 1: Lookup tables

When you have chosen lookup tables on the first price settings page, before clicking next you can also choose to use a markup-based pricing for any designs that don't match one of the lookup tables you have entered.

When you click **Next**, you can then create your lookup tables for different combinations of solar panels, inverters and batteries. Different costs can be specified within each combination for different numbers of panels.

If you use the values from the MCS performance task you can only

New Lookup

Select Panel(s)

Trina Ver... X

Select Inverter(s)

Growatt X

+ Add Row (3)

4	£ 1000
5	£ 1100
6	£ 1200
7	£ 1300
8	£ 0
9	£ 0
10	£ 0

Pricing Structure

- Lookup Table
- New Lookup
- Markup
- Delivery
- Installation
- Scaffolding
- Roofing
- Electrical
- Travel

Info

Choose the panels and inverter families you wish this lookup table to apply to. Then add prices for each array size. If you leave a line blank no price will be set. If you want to set a price for less than 4 panels, or more than 20 panels, use the 'Add Row' buttons.

Lookup tables are most useful if you install just a few different system combinations (i.e always use Trina with Growatt). If you need more than a few lookup tables, it's probably more efficient to use the 'markup' method.

Option 2: Cost of materials plus a markup

When Markup has been chosen on the first pop up screen, clicking **Next** will bring you through to the following page where you can input levels of markup for different sizes of projects.

If you use the values from the MCS performance task you can only

Markup

Enter the percentage markup which will be applied to the price you pay for your goods. Use 'Add Row' to vary this with the project size - you may choose to make a smaller markup on larger projects.

For projects larger than		Markup		
0 (Default)	kWp	20	%	
20	kWp	10	%	-
15	kWp	15	%	-

+ Add Row

Consumables and ancillaries

Enter the price for any consumable items or ancillary goods you will supply in addition to the bill of materials specified by Easy PV. Note that markup is not added to these prices - enter the prices you wish to charge the customer.

For projects larger than		Consumables total		
0 (Default)	kWp	£ 250		
10	kWp	£ 350		-

+ Add Row

Pricing Structure

- Markup
- Delivery
- Installation
- Scaffolding
- Roofing
- Electrical
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Info

Components built into Easy PV will use your current buying price from Midsummer.

You can set the prices for your own components in the component editor.

You will also notice a section for Consumables and ancillaries. This includes items not included with the PV kit such as zip ties. Throughout this calculator, you will be able to click **+Add Row** to create rules and changes to your costs depending on project size or travel distance.

Next continue through each of the steps to set up rules for your services. Click into each of the sections below for detailed instructions.

Configure required costs

Delivery

You can determine an appropriate default delivery cost and hazardous surcharge fee (when a battery is added to a project) for various project sizes.

If you use the values from the MCS performance task you can only

Delivery

Enter the price you wish to charge your customer for delivery of goods. Use 'Add Row' to vary the price by project size.

For projects larger than

Delivery

0 (Default)

kWp

£ 75

10

kWp

£ 150

–

+ Add Row

Apply a hazardous surcharge if there is a battery in the project

Pricing Structure

Markup

Delivery

Installation

Scaffolding

Roofing

Electrical

Travel

Installation

Here you can add a base installation cost which may cover all of your services (scaffolding, electrical, etc.) or you can set those up separately. You can also choose what text is displayed on the quote for this line item.

If you use the values from the MCS performance task you can only

Base Installation Cost

Enter your base price for installation of a PV system. Use 'Add Row' to vary the price by project size.

For projects larger than

Installation price

0 (Default)

kWp

£ 500

10000

kwh

£ 10000

–

+ Add Row

How would you like the installation price to appear on the quote?

Installation booking and adr

Pricing Structure

Markup

Delivery

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Roofing

Electrical

Travel

Configure optional costs

Scaffolding

In this section, you can set a base scaffolding fee and an extra cost for each additional roof. You can also set parameters for max length and height and have an additional charge or multiplier if those parameters are exceeded.

If you use the values from the MCS performance task you can only

Scaffolding

Enter the base price for scaffolding. This will be added if there is at least one roof in the project.

£ 500

Base length m Price per meter over base length

Price per additional roof

If scaffolding price depends on the number of scaffold lifts, or on the number of floors, you can set a multiplier that is applied when the height to the roof gutter is over a given threshold. We can only calculate this automatically if you use the 3D buildings editor for your quote.

Scaffolding cost multiplier When height over m -

+ Add Row

Combine scaffold price within installation price on quote

How would you like the scaffolding price to appear on the quote?

Pricing Structure

- Markup
- Delivery
- Installation
- Scaffolding
- Roofing
- Electrical
- Travel

Warning

We can only estimate scaffolding costs where you have used the 3D editor to create your project.

Info

Scaffolding costs will be added for all pitched roofs. They won't be added for flat roofs or ground mount systems.

Please note that some elements of the pricing calculator will only work for projects created with the 3D design mode. If you use one of the other design modes scaffolding costs may not be calculated.

Roofing

For roofing , you can add a base cost and fee for each additional roof. You can set additional charge per solar panel depending on the roof type. Finally, you can add a cost for per each extra such as in-roof panel, optimiser, etc.

If you use the values from the MCS performance task you can only

Roofing

Base price for roofing work

£ 500

Price for each additional roof

£ 500

Roof type	Additional cost per panel	Additional cost per roof hook
Default	£ 0	£ 0
Slate	£ 10	£ 20
Flat / Rosemary tile	£ 5	£ 0
Concrete tile	£ 0	£ 0
Sheet metal	£ 0	£ 0
Fibre cement	£ 0	£ 0
Flat	£ 0	£ 0
Ground	£ 50	£ 0

Pricing Structure

- Markup
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Info

It's up to you how detailed you wish your pricing to be here. You can make the cost scale with the number of roof hooks or panels you install - or both - or you can just charge a flat fee for roofing work.

Electrical

Similarly, you can add a base electrical cost, additional fees for the installation of different inverters, and a cost for the installation of a battery.

If you use the values from the MCS performance task you can only

Electrical

Base price for electrical work

£ 300

Inverter type

Single phase PV inverter

Cost of installation

£ 200

Three phase PV inverter

£ 600

AC battery inverter

£ 150

Microinverter (per string)

£ 300

Price for installation of first battery

£ 200

Price for every additional battery

£ 100



Combine price of electrical work within installation price

How would you like the price for electrical work to appear on the quote?

Electrical installation

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Next

Pricing Structure

- Markup
- Delivery
- Installation
- Scaffolding
- Roofing
- Electrical
- Travel

Info

You can set a base price for electrical work, or different price for different types of inverter - it's up to you.

Travel

You can add costs for travel to site based on the distance (which Easy PV automatically calculates if you have input the project location and your company location!). You can also set up a travel cost multiplier for larger systems.

If you use the values from the MCS performance task you can only

Travel

For distances over

For distances over	Travel cost
20 miles	£ 100
30 miles	£ 120

+ Add Row

For systems larger than

For systems larger than	Travel cost multiplier
6000 kWp	1.1
7000 kWp	1.2
15000 kWp	2

+ Add Row

Combine travel price within installation price on quote

How would you like the travel price to appear on the quote?

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Pricing Structure

- Markup
- Delivery
- Installation
- Scaffolding
- Roofing
- Electrical
- Travel

Info

If you wish to add a price for travelling to site you can do so here. You can add increasing costs for distance, and multipliers if you wish to charge more for larger systems.

The distance used is the shortest driving distance from your office address and postcode, which you can set in your pro account settings.

Configure other costs

If there are costs you want to include on every project that you can't factor into any of the above sections then you can do so by adding a new accessory custom component.

To do this navigate to **My components > Accessories** and then:

1. Create a new accessory, name it with whatever additional service you want to include
2. Do not fill in the 'price' box
3. If you would like the item or service to be included on all projects, then select the second option '**Include by default**' in the rules. If you do not want to include by default you will be able to select it on a per-project basis in the **electrical task**.
4. Then scroll to bottom of '**rules**' and check the following options:
 - Add installation cost - this is where you fill in the price and name of the item or service

Selected mounting systems only

Selected meters only

This is a connector

Include with other accessory

Add installation cost

Control quote display

Add a cost for installation of this item. This will be added to the services section of a customer quote when this item is selected.

Cost:

100

Specify the text to appear on the quote. If you leave this empty, the cost will be added to the base installation cost and no additional line will appear on the quote.

Text:

MCS accreditation

[+] Add accessory

- Control quote display - this is where you can decide how it will display on the quote

Selected mounting systems only

Selected meters only

This is a connector

Include with other accessory

Add installation cost

Control quote display

[+] Add accessory

separately, or included with other goods.

If you use lookup tables for pricing, and choose 'include' below, no additional cost will be added for this item. If you choose 'itemise' a separate line will be added for this item.

If you use markup-based pricing and choose 'itemise' a separate line will be added for this item. If you choose 'include' the cost will be added to the line for electrical and ancillary items if you choose to have a multi-line quote, or added to the single line cost of goods if you choose to have the more compact format.

Category:

include

5. You can also have a look at the other rules available on accessories and decide whether you would like to include or not include the item (for example, only include with specific inverters).

Revision #31

Created 19 September 2024 11:46:21 by Cammie Settle

Updated 29 April 2026 10:54:26 by Daisy