

How to create quotes and place orders

- [Creating quotes and placing orders](#)

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Account Set Up

Step 1: Log in

Navigate to midsummerwholesale.co.uk. Make sure you are logged in to your Midsummer wholesale account to view trade pricing and live stock levels by checking your name is in the top right corner. If you don't have a Midsummer account yet, you can [register for one using this link](#).

Step 2: Link your account to Easy PV (optional)

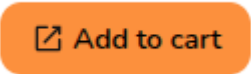
If you use Midsummer's free design software ([Easy PV](#)), link your Easy PV account to your Midsummer portal account via your Easy PV account settings. This allows full kit lists from your PV designs to be pushed straight into your wholesale basket.

Building Quotes

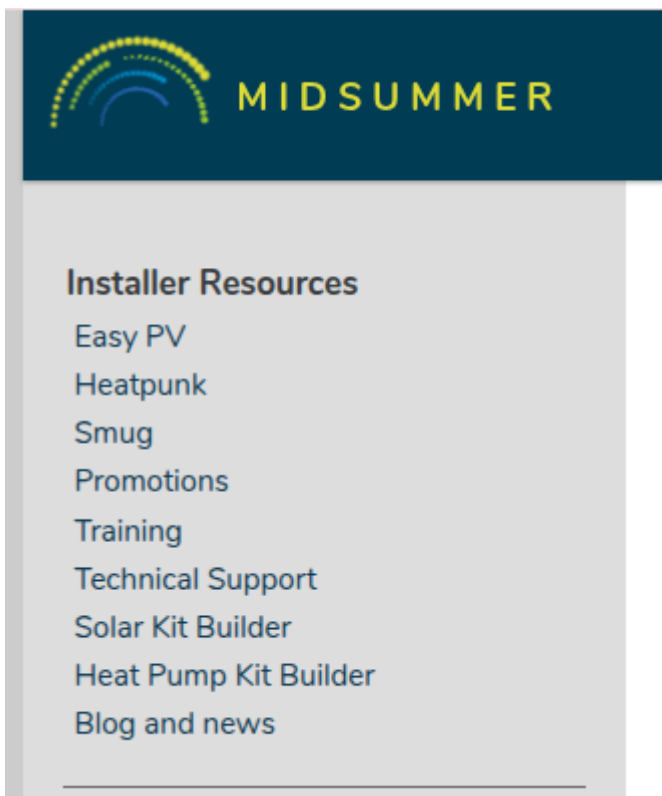
There are three primary ways to create quotes;

1. Add Products to Your Cart: Choose Method A or Method B.

- **Method A (Via Easy PV Software):** Create a system design on Easy PV. Click the button above the bill of materials to add kit to your basket.

An orange rectangular button with rounded corners. On the left, there is a small icon of a shopping cart with a plus sign. To the right of the icon, the text "Add to cart" is written in a white, sans-serif font.

- **Method B (Using the Solar Kit Builder):** Use the solar kit building (located in the 'installer resources' on the left hand side of the website. This will automatically create an accurate bill of materials for you based off of the roof type and proposed panel layout.



- **Method C (Directly on the Midsummer website):** Use the search bar (e.g., search "455w panel" for fast comparisons) or the left navigation categories to locate parts. Enter quantities and click **Add to Basket**. You can also use the **Quick Add** feature inside your cart view.

2. Review Your Basket & Check Availability: Verify stock and warnings.

Open your cart. Check live stock availability. If an item is out of stock, a red warning banner will display the expected inbound availability date.

3. Save as a Quote: Valid for 30 days.

Instead of checking out immediately, select **Save Cart as Quote**. Add a project reference name (e.g., *Job Ref / Client Name*). Your quote is now generated and saved under your account dashboard for **30 days**. You can download it as a PDF or CSV.

Turning a Quote into an Order

1. Retrieve the Saved Quote: Access from your dashboard.

Go to **My Account > Saved Quotes**. Locate your quote and click **Load into Cart**. You can adjust quantities or add/remove items if necessary.

2. Add Reference & Purchase Order (PO) Details: Crucial for commercial billing.

Enter your internal project reference or **Purchase Order (PO) Number** in the designated field. Ensure the prices on your internal PO match the prices shown on Midsummer's portal confirmation.

3. Select Delivery Options: Select date and site notes.

- Select your target **delivery date**
- Choose your delivery / collection option (collections must be organised with your account manager prior)
- Add specific site instructions (e.g., "*Restricted access – 7.5t vehicle required*" or "*Call driver 30 mins before*") in the **Delivery Instructions** box.

4. Confirm & Submit Order

Review your final summary.

5. Complete Payment: Depending on your account terms.

- **Credit Account:** If you have an approved credit limit, the order will process against your account balance.
- **Proforma / Pro-Direct Payment:** You will receive a order confirmation link. You can pay immediately via card (via SagePay) or select BACS to view bank details and log your transfer notification.