

# Setting up your account

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# Connecting to Midsummer

This guide applies to the [easy-pv.co.uk](https://easy-pv.co.uk) and [beta.easy-pv.ie](https://beta.easy-pv.ie) versions of Easy PV. The information provided here may not be accurate for [easy-pv.com](https://easy-pv.com) and [easy.pv.ie](https://easy.pv.ie).

Connecting your Easy PV account to your Midsummer account will allow Easy PV to set its prices to match your wholesale prices. This means you do not have to make changes to your goods prices in the financial tab except for custom components and you can be confident your jobs are being priced correctly.

## To connect your Midsummer account

1. Navigate to **My account > Preferences > Connect to Midsummer**.
2. Input your Midsummer email address and password and click 'Connect' to link your account.

Your browser may auto-fill with your **Easy PV** email and password, please ensure you are using your **Midsummer** details.

3. Your account will then refresh and your wholesale prices will apply.

For Easy PV Pro teams, each member will need to connect their wholesale account for discounts to apply.

# Setting financial defaults

This guide applies to the [easy-pv.co.uk](https://easy-pv.co.uk) and [beta.easy-pv.ie](https://beta.easy-pv.ie) versions of Easy PV, references to MCS only apply to the UK site. The information provided here may not be accurate for [easy-pv.com](https://easy-pv.com) and [easy.pv.ie](https://easy.pv.ie).

Financial defaults set here will be automatically applied to your projects so you do not have to input them each time. These defaults can be overridden on a per-project basis.

For standard Easy PV users, you can set up financial defaults in **My Account > Preferences > Financial**. For Pro teams wishing to set team defaults, these can be found in **Pro account settings > Financial**. If you are a member of a Pro team, you may not be able to set these defaults as they will be configured by your team owner or admins.

## Main settings

- **Projection term:** The number of years you wish to make financial projections. This should be approximately the expected lifespan of the equipment.
- **Inflation rate:** this is the Inflation rate for your financial projection.
- **Panel degradation rate:** panels gradually reduce in output as they degrade over time. Set the rate at which the output of the panels decreases each year.
- **Discount rate:** a discount rate is a means of determining the current value of something (like income or savings from a PV system) that you'll receive in the future.

Here you can also select the default value of self-consumption. Self-consumption is the proportion of electricity generated from a solar array that is used in a property can significantly affect financial returns. Easy PV has several different methods you can use:

- **(For UK) MCS:** this can only be used with flat tariffs and properties with annual consumption between 1500 - 6000 kWh and battery storage below 15.1 kWh.
- **Easy PV:** this can be used for a project of any size and can be used with variable tariffs. Information on setting up variable tariffs can be found in the [consumption task guide](#).
- **Custom percentage:** this contains significantly less information than the above methods. When using a custom percentage the 'Battery Storage' section in the Customer Proposal will not generate. If you would like this to generate, select the MCS or Easy PV self-consumption.

## Tariffs

Here you can set default tariffs for the Easy PV and (for UK) MCS consumption calculations. They can be indexed to inflation, above inflation, fixed or none.

For more detail on how to create and edit these tariffs, have a look at our [tariffs guide](#).

## Automatic pricing calculator

This is where you can tailor the financial settings so you do not have to make significant adjustments on each project. You can set up rules based on look-up tables or a set markup and then set costs for the delivery and installation and optionally scaffolding, roofing, electrical, travel costs and any additional services you provide.

A full guide on how to set this up can be found here in the [automatic pricing guide](#).

## Manual pricing markup

If you are not using the pricing calculator, you can set a default markup which is applied to the cost of goods.

## Tax settings

Here you can set defaults for the tax rate for material and services and select whether the customer will be able to reclaim the tax. Business customers can usually reclaim tax paid on an installation, but domestic customers typically can't reclaim tax. Tax rates may be different for domestic and business customers.

## Running cost rules

Add lines for costs you expect to be incurred in the future. You can choose whether costs are applied on an annual basis (for example a maintenance contract) or as one-off costs (for example an inverter replacement).

## Saving rules

Create savings rules which can be used in the financial task. You can set them to appear on every project or only be applied if a given accessory is present and can add savings based on a percentage of bills, percentage of annual generation, fixed monetary amount or a saving in kWh each year.

# Setting up your Automatic Pricing Calculator

This guide applies to the [easy-pv.co.uk](https://easy-pv.co.uk) and [beta.easy-pv.ie](https://beta.easy-pv.ie) versions of Easy PV. The information provided here may not be accurate for [easy-pv.com](https://easy-pv.com) and [easy.pv.ie](https://easy.pv.ie).

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 **Account settings** > **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 modal.

## 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

Q

▼

Select Inverter(s)

Growatt X

Q

▼

+ 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
- ☒ Travel

#### 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

✓ Installation

✓ Scaffolding

✓ 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

5m

Price per meter over base length

£ 125

Price per additional roof

£ 350

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

1.2

When height over

8m

–

+ 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.

ℹ 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
- ✓ Delivery
- ✓ Installation
- ✓ Scaffolding
- ✓ Roofing
- ✓ Electrical
- ✓ Travel

#### 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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### 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		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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Next

## 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.

### Accessories and extras

Accessories and extras can be added by creating a new component in the **Edit Accessories** section of **Components**. When adding an accessory or extra component, you can add an installation charge as well, and configure whether you want the price applied to the extra to be displayed in the quote as a line item, or grouped into the materials costs.

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

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:

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:

[+] 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).

# Performance task defaults

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The performance task can be streamlined by configuring your settings in **My account > Preferences > Performance**. Here you have the option to configure whether you want panel allocation and sunpaths to be automated.

## Panel allocation

Choose between:

- **Automatically allocate panels:** use auto-stringing to automatically make a string plan without any input needed from you.
- **Suggest allocation:** use auto-stringing to make a string plan which it will suggest for you to accept or edit manually.
- **Manually allocate panels:** manually construct your string plan, with the option to use auto-stringing when you do so.

## Sunpaths

With 3D and Magic design mode, by modeling any nearby obstructions, Easy PV can automatically calculate any shading losses. Here you can choose whether you want this to be done automatically or whether you would like it to remain manual for 3D projects.