

Getting Started with Heatpunk Pro

Our pro tier unlocks team collaboration and access to features that can save you time and impress your customers with a professional journey through their quote and installation.

What do I get with Pro?

We run [weekly training sessions](#) which cover all the features that you get with pro. The cost is £35 / month (plus VAT) per user. Below is a summary of everything included in Heatpunk Pro.

- [Upload floor plan](#)
- [Custom components](#)
- [Project and component sharing](#)
- Project status tracking
- [Customised customer proposal](#)
- [E-signing](#)
- [Document storage](#)
- [Emailing](#)
- [Survey and installation record](#)
- Additional forms and reports
- [Connect Direct API](#)
- [CRM connections](#)
- [Shrunk Punk](#) (for additional cost)

How do I upgrade?

To upgrade to pro, log into the account you would like to be the [Owner](#). In the top right, you will see the option to **Upgrade to pro**:

Click this and navigate through each step:

1. Add team members and set their [role type](#)
 2. [Connect to Midsummer](#) so your pricing correctly applies for all team members
 3. Fill in billing details
 4. Pay via GoCardless instant bank payment
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[Some banks do not support instant payments](#) so if you're having trouble setting up the payment, please [get in touch](#) so we can do this manually.

Configuring team settings

Once you've upgraded, you can then configure your team settings. You can read about the options you have below:

- General
 - [Team management](#)
 - [Billing and subscription details](#)
- [Setting up sharing permissions](#)
- [Automatic pricing calculator](#)
- [Documents](#)
 - Upload shared documents that can get attached to emails
 - Upload images used in proposal customisation
- [Customer proposal](#)
- [Email settings](#)
- [Shrunk Punk](#)

If you have further questions about pro please attend an [online training session](#), have a look at our [pro FAQs](#) or [get in touch](#)!

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