Setting up your Heatpunk Pro account

heatpunk.co.ukThis guide applies to Heatpunk UK.

How do I upgrade to Pro?

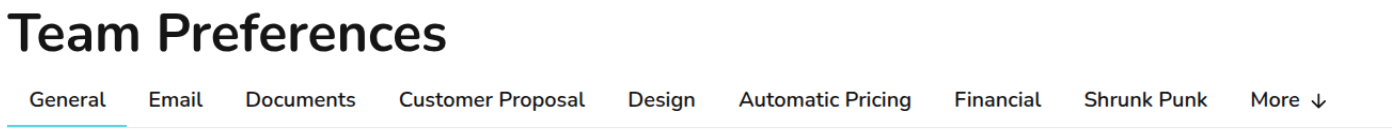
Click **Upgrade to Pro** in the top right corner, while logged into the account you would like to be the Owner of the Pro team. This Owner account cannot be changed or removed from the team.

1. Click Upgrade to Pro in the top right corner
2. Add team members and set their role type
3. Connect to Midsummer so your pricing correctly applies for all team members
4. Fill in billing details
5. Pay via GoCardless instant bank payment

> 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.

Configure team settings

Correctly setting up your **team preferences** can help you make the most of Heatpunk Pro. Navigate to **Pro account settings** and click through each tab to set this up. Find further information in each section below.



1. General

If you have multiple users in your team, you can edit team members and what role they have here. Read more about Pro team management and user roles.

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The details you set under **Company Details** will be used throughout Heatpunk tasks, forms, and reports.

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At the bottom of this section you can view and change your **subscription status**.

2. Configure email credentials

With Heatpunk Pro you can send emails to your customer within projects. By setting up your email credentials, it means these emails will send from your domain, rather than from no-reply@heatpunk.co.uk.

Read more on how to set up email credentials.

3. Upload team documents

Any files uploaded to the documents tab will be accessible to any user in the team when sending emails through Heatpunk. Upload your terms and conditions, MCS certificate or anything else you would like available for all projects.

TeamUploads.gif
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4. Set up proposal customisation

With Heatpunk Pro you have the option to customise the customer proposal to align more with your branding.

Read more about setting up your customised proposal.

5. Automatic pricing

With Heatpunk Pro you have the option to set up automatic pricing options to make things quicker.

Find out more about automatic pricing.

6. Shrunk punk

Shrunk punk is a lead generation tool to help you grow your business.

Learn more about Shrunk Punk.

7. CRM connections

In this tab you can access your API key to connect with CRMs and job management platforms.

Take a look at our developer guidelines if you would like to set up your own integration.

8. Design

In the Design tab you can configure temperature settings. Team-level default design settings trump user-level default design settings.

Find out more about the outdoor design temperature (ODT) settings.

Getting started with Pro features in a project

Once you've configured your Pro account settings, you can get started using Pro features within a project.

Project statuses

From the project overview, you'll now be able to set the status on your project. Use filters on the right-hand side to view jobs in each stage.

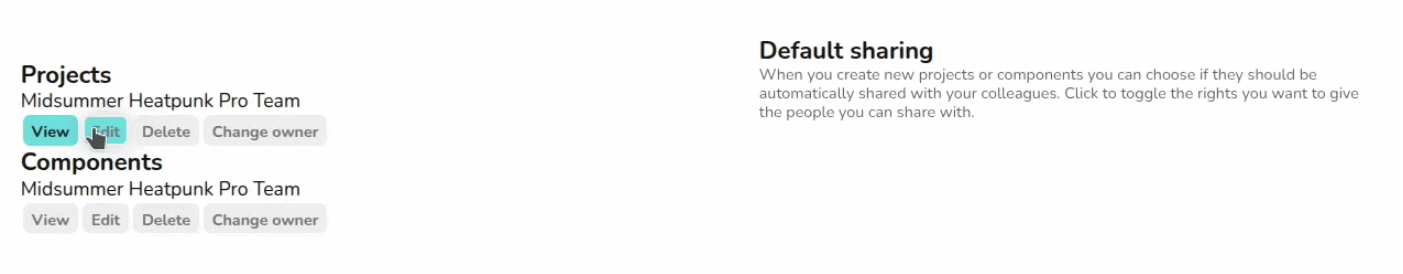
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Project and component sharing

Old projects and components will not be shared with your team by default. Any old projects you'd like shared with your Pro team, you can share manually. If you'd like all old projects or components to be bulk shared get in touch and we can do this for you.

Sharing.gif
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If you'd like new projects or components shared by default, navigate to **My account** > **Preferences** > **General** and then **Default sharing**. Select the permissions you'd like to be given by default on new projects. These settings are account (not team) specific so will only apply to the account you are logged into.



Read more about sharing.

Using project features

Read more about the Pro features you can now use in projects:

- E-signing
- Document storage
- Sending emails
- Survey and install records
- DNO applications via Connect Direct

Still Need Help? / Want to know more?

- **Related FAQs:** Check out our Pro and Enterprise FAQs for answers to common questions
- **Further guides**: Take a look at our Getting started with Pro guides
- **Live training:** Book a free online training session to see this feature in action

Contact Support: If you've got further questions, get in touch with our support team at **help@heatpunk.co.uk** (UK) or **help@heatpunk.ie** (IE). *If you are experiencing a bug, to help us look into your issue faster, please include the email address of your account, the name of the project and screenshots of any unexpected behaviour.*

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