# Heatpunk Pro: help your team work more efficiently

Running a renewable heating business today means juggling a lot at once: fast-moving leads, complex designs, tight installation schedules, regulatory paperwork and a customer base that expects clarity at every step. As your team grow, the challenges grow too, from more people touching the same projects, more room for inconsistency, and more opportunities for things to slip through the cracks.

Heatpunk Pro is designed to give installers a shared workspace where projects stay organised, pricing stays consistent and communication stays clear. Instead of relying on scattered tools and manual processes, Pro features help your team work in a single, structured environment from first contact to final handover.

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## 1. Team-wide settings and workflows

As teams grow, consistency becomes one of the biggest challenges. Two designers might price the same job differently. A surveyor might forget a detail that slows down the installation. Someone might save documents in the wrong place, leaving others searching for information. Pro tackles this by giving your team a shared place to work end ensures everyone works in the same way.

- **Team-wide settings** ensure everyone uses the same components, defaults and pricing logic.
- **Role-based controls** protect sensitive information and prevent accidental changes.
- **Shared project access** means anyone can pick up where someone else left off.
- **Configure email sending** to come from an email address you own.

Read more about managing Pro team settings.

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## 2. Quick lead generation & price estimates

The early stages of a heat pump sale are often where teams lose the most time. You need to qualify interest quickly, understand whether a customer is a good fit and produce a proposal that's accurate enough to move the conversation forward – all without sinking hours into manual calculations. Heatpunk Pro can help in two ways.

### Generate and qualify leads with Shrunk Punk

**Shrunk Punk** is a paid add-on that works alongside Heatpunk Pro. Once enabled, you can embed the tool on your website and quickly give visitors an idea of the size of the heat pump they would need to heat their home - all without you lifting a finger! You can use your Pro team pricing rules to quickly follow up with an instant estimate via email. It helps you capture interest early, filter out low-intent enquiries and focus your time on customers who are genuinely ready to move forward. Leads will appear in the Heatpunk leads dashboard for all your team to access, and you can convert them to a full project in a single click. Find out how to get set up with Shrunk Punk.

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## 3. Integrated survey functionality

The value of surveys and capturing all the information required for a successful installation is often overlooked. Pro's built in survey features make it easy to ensure your team can do this efficiently.

- **Pre-installation survey tasks** Surveyors can complete a standardised survey directly within the project. This ensures all required information (like building fabric details, electrical setup, access notes, customer preferences) is captured consistently and passed cleanly to the design and installation teams.
- **Installation record tasks** After the job is complete, installers can record key details in a structured installation record. This creates a consistent, auditable record of what was installed, how it was configured and any site-specific notes that may be important for future maintenance or customer support.

Read more about Heatpunk's survey functionality.

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# 4. Consistent, professional proposals every time

Your proposals should look and feel like *your* business. With Pro, you can customise your branding, cover letters, terms and financial settings so every proposal is consistent – no matter who creates it. Customers receive branded emails, clear payment options and documents they can e-sign instantly.

- **Customisable proposal documents** let you add your branding, a cover page, an “About us” section and your own terms and conditions.
- **Payment and finance options** gives customers flexibility in how they pay.
- **Send emails to customers** directly from Heatpunk
- **E-signing** removes friction from the contract stage.
- **Manage additional documents** required for the sale, like letters of consent, cooling off waivers, etc.

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# 5. Keep projects organised from start to finish

As projects move from lead to design to installation, information can easily become scattered. Heatpunk Pro helps you bring more of this together so you have a single source of information. Here’s how the Pro functionality keeps projects structured and on track:

**Project status tracking**: Projects can be sorted into statuses, giving you a clear overview of what stage each project is at.

Pre- and post-installation surveys: Help capture all project and install information in a standardised way.

Integrated email sending: Emails can be sent directly from Heatpunk with project documents attached automatically.

E-signing for customers and your own team members: Signed documents are stored automatically in the project. This removes the friction of downloading PDFs, chasing signatures or dealing with scanned copies.

DNO applications via Connect Direct: Project data is pre-populated into DNO forms, and the ENA Connect Direct integration streamlines the submission process, reducing admin time and minimising errors.

Centralised document storage: All project files – surveys, proposals, reports, customer documents – can be stored in one place, with no need for a separate QMS system. Heatpunk's built in forms and reports features let you generate key project documents:

- Customer proposals
- Project technical reports
- MCS handover checklists
- Heat pump handover documents
- Heat pump commissioning checklists
- Heat pump service records
- Letters of consent
- Cooling off waivers
- Survey reports
- Installation record reports
- Electrical installation certificates (a requirement of BS 7671)
- MCS 031 performance calculation reports
- CMS Compliance certificates

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# 5. Quicker DNO applications

Submitting DNO applications can be one of the most time-consuming and error-prone parts of a project. Heatpunk Pro allows you to submit DNO applications via Connect Direct and get instant approvals. Project and survey information is pre-populated to reduce manual entry, cut down on mistakes and help ensure applications are submitted correctly the first time. It also keeps a clear record of what was submitted and when, making it easier for your team to track progress and follow up when needed.

# 6. Open APIs for deeper integration

Your Pro subscription will give you access to our Open APIs that let you connect Heatpunk directly with the other systems your business relies on. Whether you're managing leads, syncing customer records or automating internal workflows, the APIs give you the flexibility to integrate Heatpunk into your existing processes without workarounds or manual data entry. With the APIs, you can:

- **Pull project data and documents into your CRM or ERP** so your sales, operations and finance teams always have the latest information.
- **Push customer or lead information into Heatpunk** to create projects automatically and reduce admin.

Read our developer guidelines for more information.

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> ## Go further with an Enterprise solution
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> For businesses that need even more control, automation and oversight, our **Enterprise Heatpunk** solutions takes things further. Enterprise is designed for larger teams and multi-branch operations that need advanced permissions, deeper reporting, custom workflows and tighter integration with their existing systems. If you're scaling rapidly or managing multiple teams, Enterprise gives you the structure and visibility to keep everything running smoothly at volume.
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> Contact us for more information about our Enterprise solutions.

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