Offer finance with FinMatch

Our direct Easy PV integration with FinMatch gives you access to finance plans from multiple lenders, which you can offer to customers without leaving Easy PV. Once your FinMatch account is linked, each finance option appears in the Customer Proposal with a link to the FinMatch Finance Assistant, so customers can go from their quote to a finance application in a few clicks.



About FinMatch: FinMatch is a finance platform, not a lender. It connects you to a panel of lenders, while your business acts as the credit broker. This means you'll need to be authorised by the FCA to offer finance through FinMatch, and you'll need to add your own FCA disclosure text in your Easy PV financial settings. If you're not yet authorised to offer consumer finance, FinMatch's FCA Assist service can help you get set up.

Setting up with FinMatch in Easy PV

Step 1: Sign up for FinMatch

You can apply through Easy PV to FinMatch to offer finance through Easy PV. FinMatch offers access to finance plans from multiple lenders. FCA Assist helps installers get authorised quickly and efficiently.

FinMatch Finance Assistant enables your customers to click from an Easy PV quote and apply for finance instantly.

To get started:

- Standard users: Go to `My Account` > `Preferences` > `Financial`. Scroll down to **Providers** and click `Apply now`.
- Pro users: Go to `Pro Account Settings` > `Financial`. Scroll down to **Providers** and click `Apply now`.

> If you are in a Pro team, only **team owners** can apply via Pro account settings.

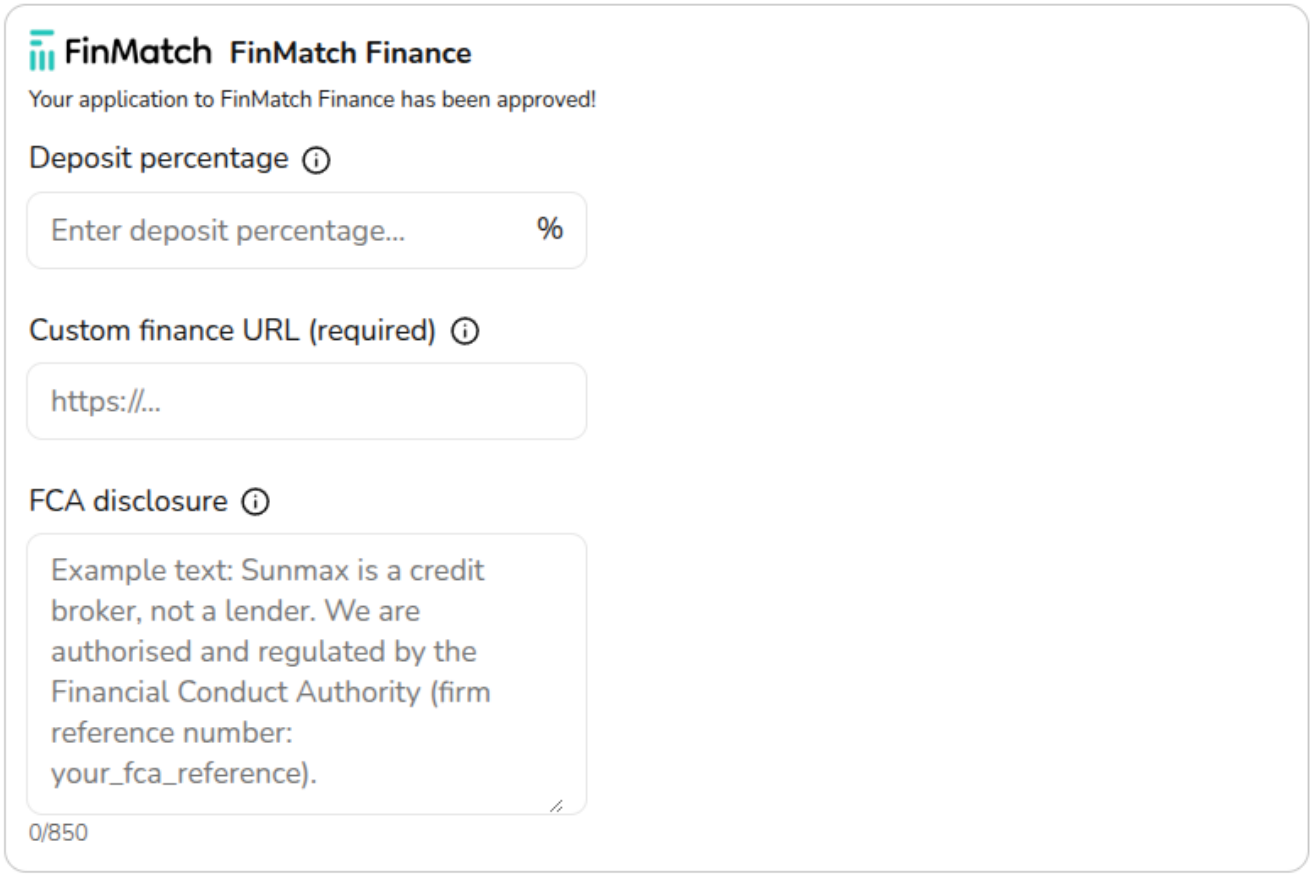
Step 2: Approval from FinMatch

Once approved, we will link your FinMatch account with your Easy PV account.

Step 3: Configure in Easy PV

In your **financial** settings, you can configure your FinMatch settings:

- Standard users: `My Account` > `Preferences` > `Financial`. Scroll down to **Providers**.
- Pro users: `Pro Account Settings` > `Financial`. Scroll down to **Providers**.



Deposit percentage

Enter the percentage of the total system cost that the customer must pay as a deposit. This amount will not be included in the financed total.

This amount can be edited on a per project basis.

Custom finance URL

Enter the full URL of the finance page on your website (for example: **https://www.yoursite.co.uk/finance**). This link will be shared with FinMatch.

A custom link to the **FinMatch Finance Assistant** will then be generated for each FinMatch finance option included in a customer proposal. Read more about this in Step 5.

FCA disclosure

Enter the customised text of your required **FCA Disclosure** which will be displayed on each finance option generated through FinMatch that is included in the customer proposal.

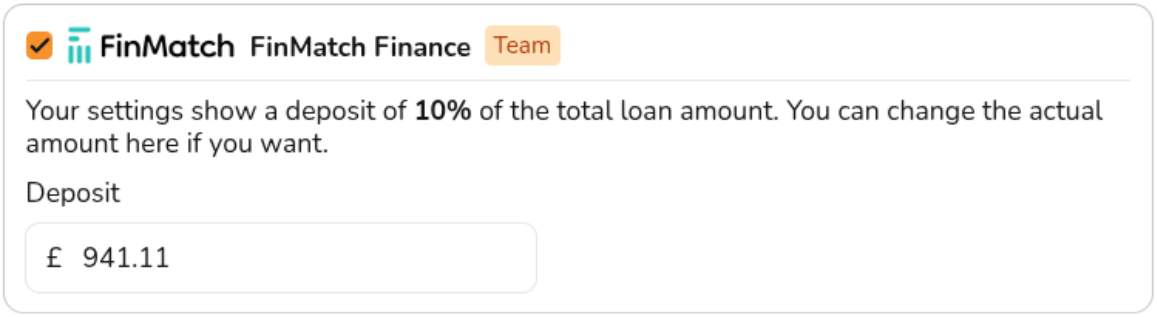
Example disclosure text
[Your Company Name] is a credit broker, not a lender. We are authorised and regulated by the Financial Conduct Authority (FCA) (**firm reference number: XXXXXX**). We do not provide financial advice but offer credit products from a carefully selected panel of lenders, all of whom are authorised and regulated by the FCA. We do not charge customers a fee or earn a commission for our credit broking services. Details of our regulated credit products are explained on our website. Credit is subject to age, status and affordability. Borrowing more than you can afford or paying late may affect your financial status and ability to obtain credit. You are not obliged to use the lender we suggest. You are free at any time to explore and secure financing independently, and it is possible that you may find a better offer elsewhere.

> **Note**: there is an 850 character limit on this disclosure text.

Using FinMatch finance options in a project

Step 4: Enable FinMatch in a project

Navigate to Financial task > `Financial inputs` > `Payment options`. You will then see FinMatch as a finance option alongside any other payment options you have configured.



Tick the **FinMatch Finance** option and (optionally) edit the deposit amount. Some finance options will have a minimum deposit value so this may be overridden.

Click **Save & Exit** in the bottom right or navigate to the **next section** in the menu on the left.

On the **Projection tab**, you can navigate between the available finance options from FinMatch on the right-hand sidebar to see the **payback for each option**.

Step 5: Generate proposal

In the customer proposal, the Payment Options pages that detail finance options generated through FinMatch will include a “Learn More” link. When clicked, this link will direct the customer to a finance details page on your website. This link can be accessed from an **e-signing link** or from a saved **PDF**.

Want to know more?

- **Related FAQs:** Check out our Financial Task FAQs for answers to common questions
- **More guides**: Take a look at Using the Financial task
- **Live training:** Book onto a live demo session to see this feature in action

Contact Support: If you've got further questions, get in touch with our support team at **help@easy-pv.co.uk** (UK) or **help@easy-pv.ie** (IE).

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