

Phoenix finance options in Easy PV

Setting up Phoenix in Easy PV

Step 1: Sign up for Phoenix

You can apply to Phoenix to offer finance through Easy PV. 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 Phoenix

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

**Phoenix Finance**

Your application to Phoenix Finance has been approved!

☒ Include in new projects

Trader email	Trader first name
<input type="text"/>	<input type="text"/>
<small>The email address of your Phoenix trader account</small>	<small>The first name of your Phoenix trader account</small>
Trader last name	
<input type="text"/>	
<small>The last name of your Phoenix trader account</small>	

Using Phoenix finance options in a project

Step 3: Enable Phoenix in a project

Navigate to [Financial task](#) > **Financial inputs** > **Payment options**. You will then see Phoenix as a finance option alongside any other [payment options](#) you have configured.

☒  **Phoenix Finance** **Team**

Trader email:

Trader first name:

Trader last name:

 **Edit customer details**

Tick the **Phoenix Finance** option. Here you will have the option to enter some additional details:

Optional details

The following fields can be left empty.

Customer salutation

Mr 

Job description

Enter job description

Customer city

Customer city

Customer county

Customer county

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 Phoenix on the right-hand sidebar to see the **payback for each option**.

Step 4: Generate proposal

When you are ready to send the Customer Proposal, click this message to generate a Phoenix quote. This will create a quote in your Phoenix account and send a copy of the Customer Proposal to Phoenix.

 Phoenix finance setup required

Generate a Phoenix quote to add a **Learn More** link to Phoenix finance options to allow the customer to view full details and proceed to a loan application.

The customer will be notified about the Phoenix quote by email and SMS. It will also add a **Learn More** link to each Phoenix finance option in the Customer Proposal, allowing the customer to view full details and proceed to a loan application.

If you update the project, you can resend the quote. This action creates a new Phoenix quote and re-notifies the customer.



Click if you want to add a Phoenix finance quote again

Generate a Phoenix quote to add a **Learn More** link to Phoenix finance options to allow the customer to view full details and proceed to a loan application.

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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