EVPro

Connecting EVPro to your XPLAN instance
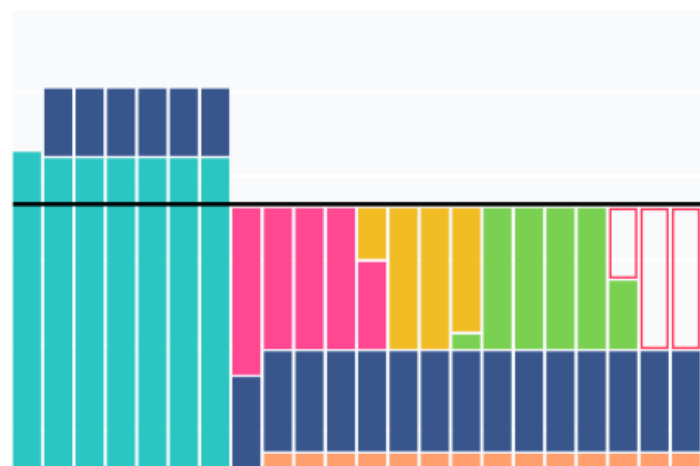
Setup Instructions

In order to access EVPro, the following steps will need to be completed:

1. Your site administrator will need to have enabled the integration on your instance of XPLAN

2. Your site administrator/company has to complete the EVPro sign-up process. To sign up, submit your details via our **EVPro sign-up page** and a member of our sales support team will be in touch to discuss your requirements.

3. Once signup and onboarding are complete, your EVPro access will be activated and you will be provided with the EVPro login details for your users.

Each EVPro user who wishes to take advantage of the EVPro/XPLAN integration will need to complete the following steps on first login:

Connecting your EVPro/XPLAN accounts
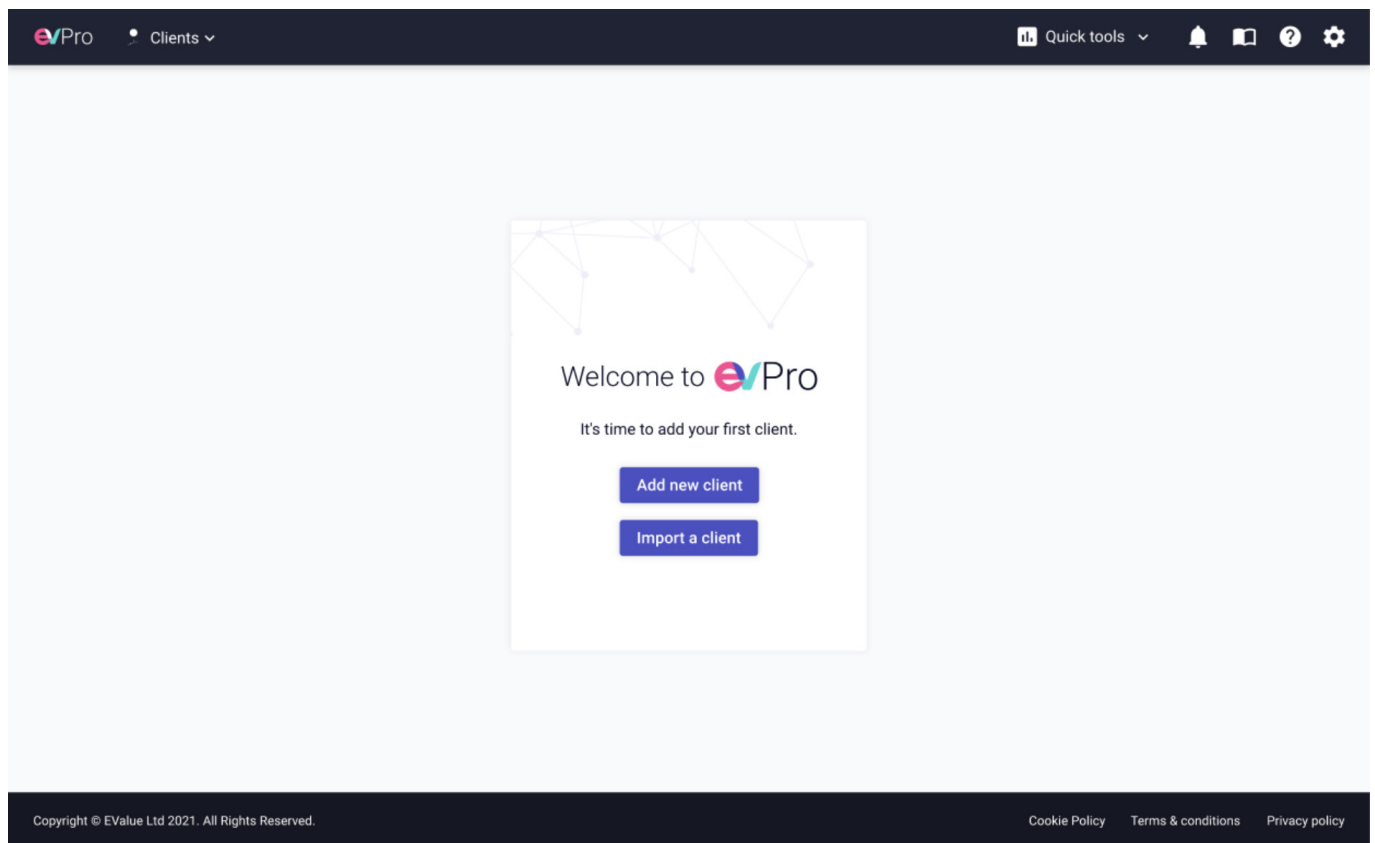
Having logged in and accepted the terms and conditions, a first time EVPro user will see the following screen. To connect your EVPro account to your XPLAN account, a user can click on the Import a client button. If the integration setup has not been completed, this warning will appear:
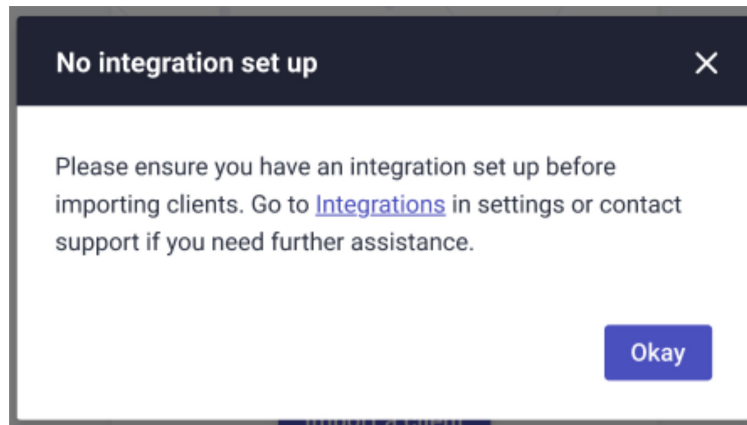
Use the 'Integrations' link here to access the Integration Settings. Alternatively a user can click on the Settings cog and select General settings -> Integrations to directly access the same integrations settings page.

Complete your XPLAN instance URL and then click 'Set up connection'.
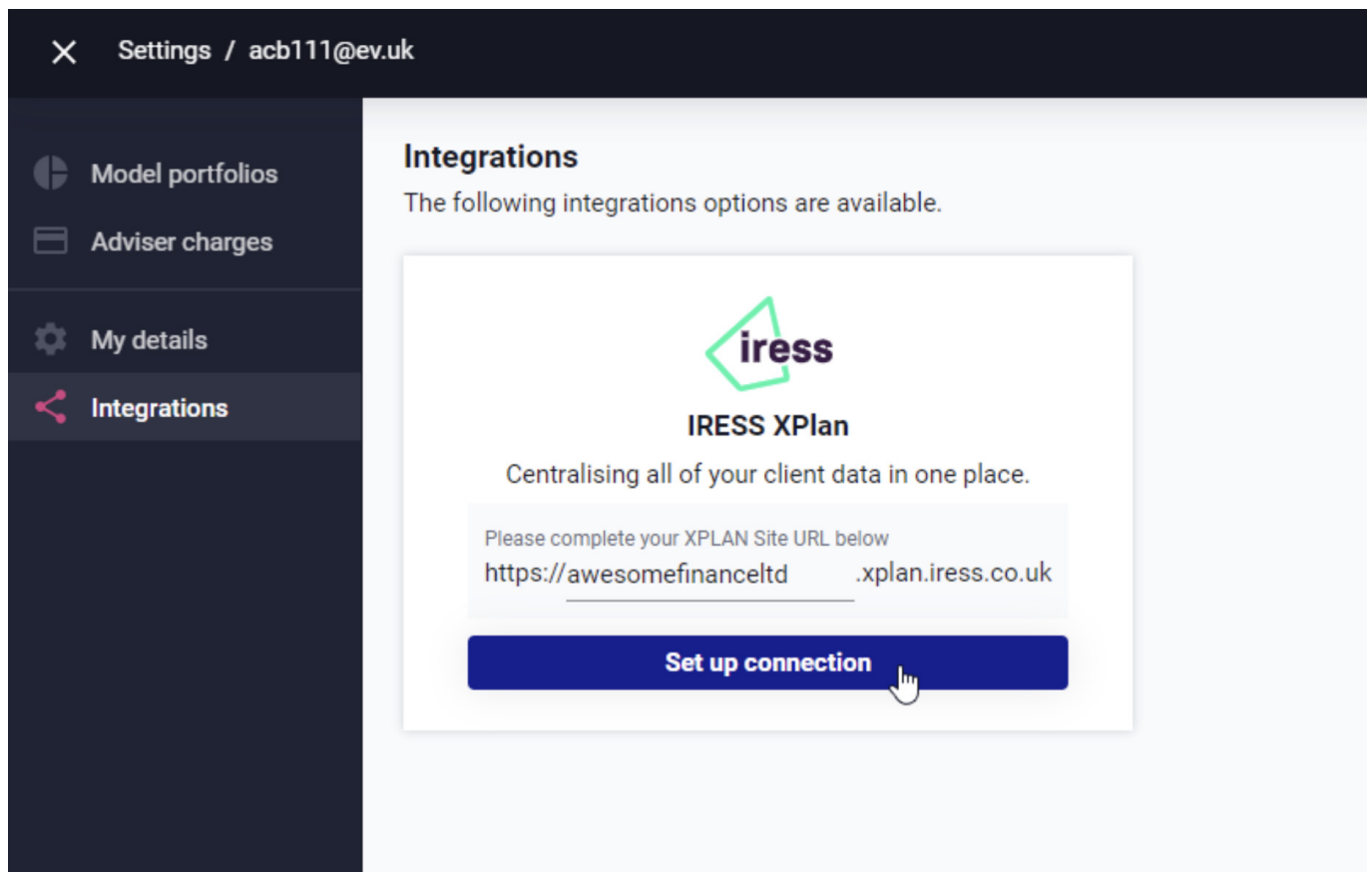
The system will then show this section to add your XPLAN username and password. Click 'Login' when done.

A pop-up window will now appear to confirm if you would like to connect to your XPLAN account. Click 'Allow'.
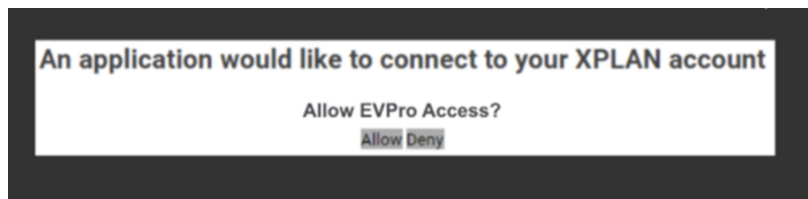
Once this has been allowed, the final message received confirms that XPLAN and EVPro are connected. This allows the user to import clients into EVPro.