

# Leads dashboard

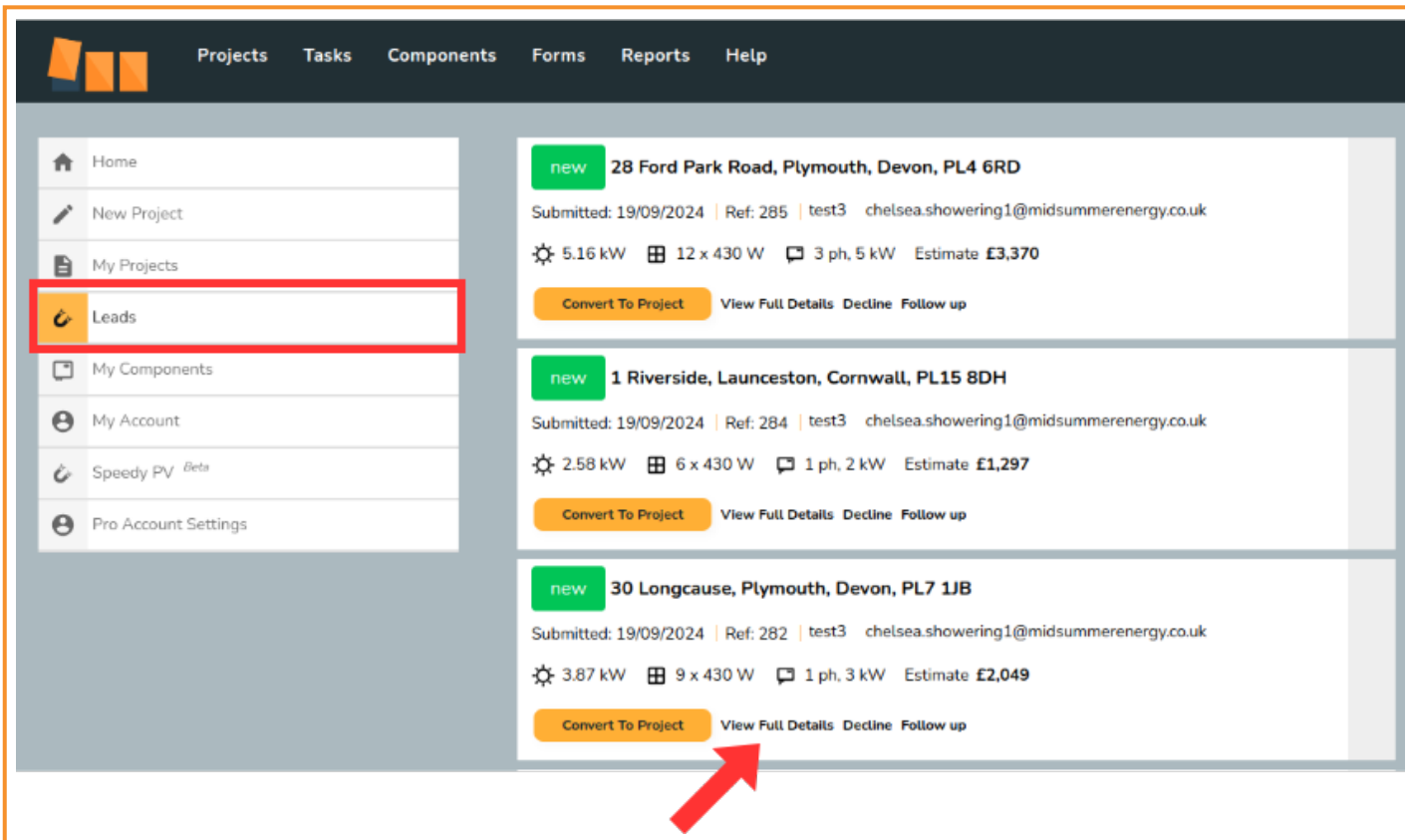
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# Speedy PV Leads

## Where to find your leads?

Leads that have been submitted through the Speedy PV tool can be located in the Leads tab on the Easy PV homepage.



The screenshot displays the Easy PV homepage interface. The top navigation bar includes 'Projects', 'Tasks', 'Components', 'Forms', 'Reports', and 'Help'. The left sidebar contains a menu with 'Home', 'New Project', 'My Projects', 'Leads' (highlighted with a red box), 'My Components', 'My Account', 'Speedy PV *Beta*', and 'Pro Account Settings'. The main content area shows three lead cards, each with a 'new' status, address, submission date, reference number, contact email, power specifications, and an estimate. Each card has a 'Convert To Project' button and a 'View Full Details' button. A red arrow points to the 'View Full Details' button on the third lead card.

Address	Submitted	Ref	Estimate
28 Ford Park Road, Plymouth, Devon, PL4 6RD	19/09/2024	285	£3,370
1 Riverside, Launceston, Cornwall, PL15 8DH	19/09/2024	284	£1,297
30 Longcause, Plymouth, Devon, PL7 1JB	19/09/2024	282	£2,049

To see the full details of the lead, click on the 'view full details' button.

## Following up leads

new

8 Chirk Close, Newport, Gwent, NP10 8HX

Submitted: 19/09/2024 | Ref: 281 | test2 chelsea.showering@midsummerenergy.co.uk

⚙️ 3.87 kW 🏠 9 x 430 W 🗨️ 1 ph, 3 kW Estimate **£2,393**

Convert To Project

View Full Details

Decline

Follow up

You can email your new leads directly through Easy PV by clicking the follow up button. This will bring up an email template which is fully customizable and can be set up to come from your company email.

### Send Email

To

chelsea.showering@midsummerenergy.co.uk

+ Bcc

Cc

chelsea.showering@midsummerenergy.co.uk

Subject

Your solar estimate

Hi test2,

Thanks for requesting an instant estimate for your property via our website.

We'd love to chat with you about your recommended system and answer any questions you have. Our sales team will be happy to learn more about your property and your requirements and provide a fully costed proposal and quote. If you'd like to speak to us, you can email our team on chelsea.showering@midsummerenergy.co.uk or call us on 07534604444.

Kind regards,

Chelsea Showering

🔍 ↶ **B** *I* U 🌐 🗑️ ☰ ☰

Cancel

Send

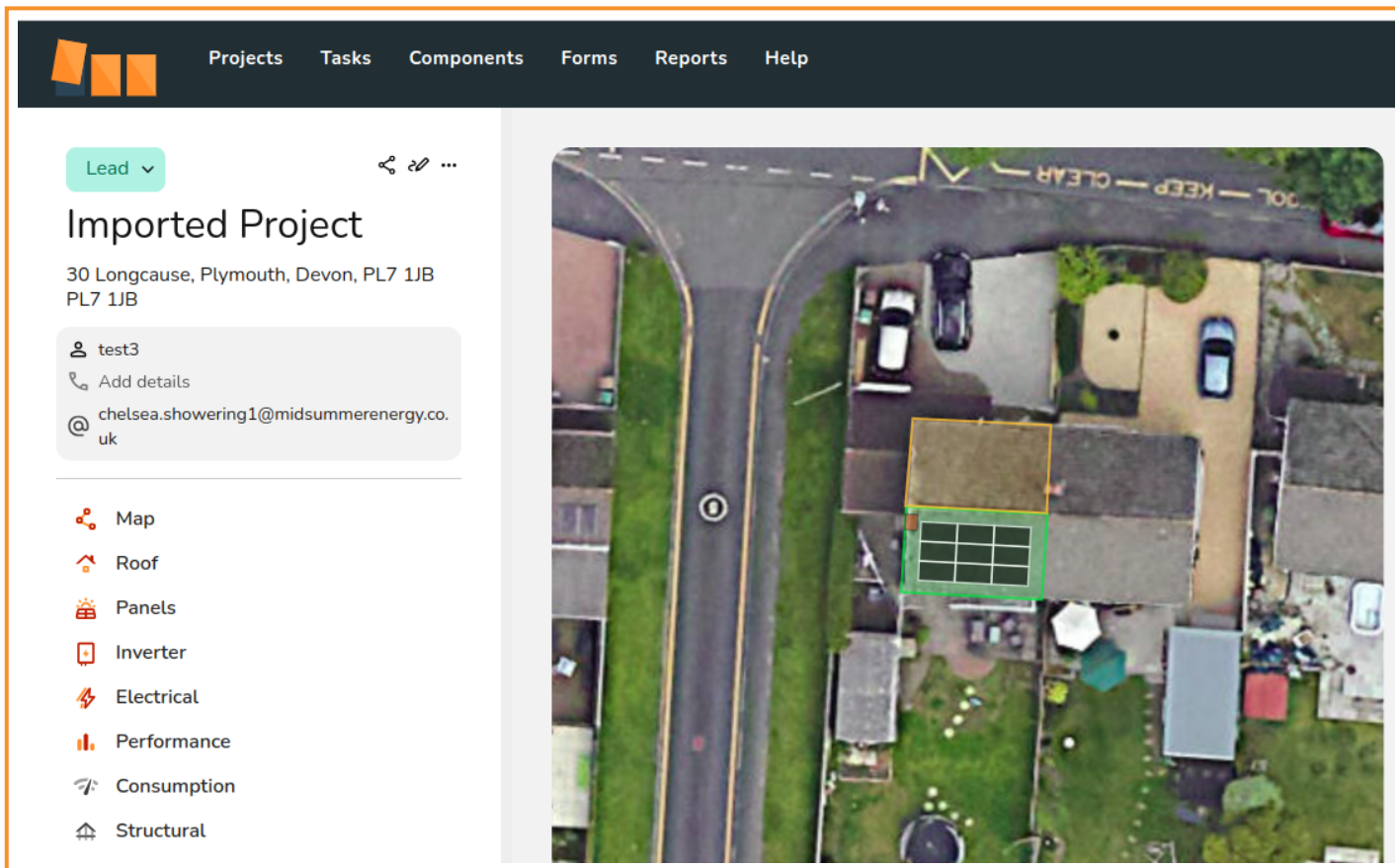
Quotation Document Required Attachments:

📎 Add attachments

## Converting leads to projects on Easy PV

It is quick and easy to convert a lead into a project on Easy PV by clicking the 'Convert To Project' icon.

This will open up the project in Easy PV and it should look like this with the roof already outlined and panels in place:



From here you can complete the remaining tasks, send formal quotes and proposals and also order your kit from Midsummer Wholesale!

**Wondering how to generate more leads through your website?**

We recommend that you sign up to our free lead generation training session for useful tips on how to generate more traffic to your website and how to maximise results from leads!

