

Emailing

You can access the email management section via the project overview. Here you can keep track of emails that have been sent.

The screenshot displays a software interface for project management. The top navigation bar includes 'Projects', 'Tasks', 'Components', 'Forms', 'Reports', 'Help', and 'My Account'. The main content area is divided into several sections:

- Lead:** Shows the date 'Mon Jun 17 2024' and the address '61 High Street Cambridge Cambridgeshire CB22 6RP'. There are three 'Add details' buttons.
- Forms:** Divided into 'Complete Forms' and 'Incomplete Forms'.
 - Complete Forms:** Scaffolding Request, DNO application via Connect Direct.
 - Incomplete Forms:** PV Array Test Report, PV Array Test Report V2, G99 50KW - DNO Application Form, Letter of Consent, G98, G99 A1-1 - DNO Application Form, G99 A1-2 - DNO Application Form, G99 A3-1 - Installation Document, G99 A3-2 - Installation Document, G99 A3-3 - Installation Document.
- Documents:** An 'Upload' button is visible.
- Price List:** A table of items with prices.

1	Unknown electrical accessory (3515)		Not a stock item
2	AC isolator - IMO - 40A 4-pole	£36.40	£72.80
4	MC4 4mm Connector Pair	£3.00	£12.00
1	50m reel of 4mm2 solar cable	£42.00	£42.00
40	Fastensol black universal clamp	£1.54	£61.60
20	Fastensol black end cap	£0.63	£12.60
40	Fastensol landscape slate roof hook	£5.18	£207.20
10	Fastensol silver rail 3550mm	£25.20	£252.00
Total (ex VAT and delivery)		£3340.56	
- DNO Application:** A 'Continue' button is present.
- Emails:** A section with a 'Blank Email' button and three email templates: 'Quotation', 'DNO', and 'Handover pack', each with a close button.

If you would like emails to send from your email and domain, rather than no-reply@easy-pv.co.uk, then follow the steps outlined [here](#).

Editing and sending an email

Send Email

To

+ Bcc

Cc

leo.kelly+pro@midsummerenergy.co.uk

Subject

Solar PV proposal for 61 High Street Cambridge Cambridgeshire

Dear customer,

I'm pleased to share a proposal for a solar PV system at 61 High Street Cambridge Cambridgeshire. Our recommended system will help you save money on your energy bills over the lifetime of the system and contribute to a greener future. If you have any questions or need further clarification, feel free to reach out to us.

Thank you for considering our proposal.

Kind regards,

ProLeo Kelly
Midsummer Installations

Quotation Document Required
Attachments:

Quotation: →
Quotation incomplete

Add attachments

Cancel Send

Using the Quotation email as an example, when you click on the **Quotation** email option it will open an email window, like the one shown above. The customer's email address will automatically be filled (if it has been added to the project). Your email will populate in the 'Cc' field.

The quotation will be automatically attached to the email if it was saved to the file management section. You can add other attachments and then click **Send** when you are ready to send.

Adding additional attachments

You can add additional files to the email by clicking **Add attachments**. Please note you will only be able to upload files you previously uploaded/saved to the file management section or component management section.

Important: Please note that if you send the quote to the customer via this method, it will be sent as a PDF attachment. Follow the instructions [here](#) to send documents for e-signing.

Revision #5

Created 19 September 2024 12:53:45 by Cammie Settle

Updated 19 June 2025 10:07:58 by Daisy Kernick