

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 the HEATPUNK project overview interface. The top navigation bar includes 'HEATPUNK', 'Projects', 'Tasks', 'Components', 'Forms', 'Reports', 'Help', 'My Account', and 'Admin'. The main content area is divided into several sections:

- Header:** 'Please select...' with a dropdown arrow, the date 'Wed Jul 31 2024', and the address '81 Kings Hedges Rd, Cambridge, UK CB4 2QD'. Below this are three 'Add details' buttons.
- Left Sidebar:** A vertical menu with icons and labels for 'Plans', 'Heat pump', 'Performance', 'Financial', and 'Surveys'. At the bottom is a promotional banner for 'Solar panels, Heat pumps, and more!'.
- Forms Section:** Titled 'Forms' with a sub-section 'Complete Forms' containing four items: 'Compliance Certificate', 'DNO Commissioning Form', 'Customer proposal', and 'DNO application via Connect Direct'. Each item has edit and share icons.
- Documents Section:** Titled 'Documents' with an 'Upload' button. Below it is a 'Reports' section with icons for 'MCS Compliance...', 'DNO commissioning...', 'Heat Pump Project...', 'Heat Pump Survey', 'Customer proposal', and 'See All'.
- Right Panel:** Contains a technical specification card for a heat pump (Sound Power Level: 61.0 dB, Nominal Output: 4.00kW, Proposed Flow Temperature: 44°C, Heating SCOP at 44°C: 3.8, Actual Output at 44°C: 413kW), a 'DNO Application' card with a 'Continue' button, and an 'Emails' section highlighted with a red border. The 'Emails' section has a 'Blank Email' button and a list of four sent emails: 'Quotation', 'DNO', 'ENA Connect', and 'Handover', each with a red 'x' icon for deletion.

Editing and sending an email

Send Email

To
 + Bcc

Cc

Subject

Dear customer,

I'm pleased to share a proposal for a heat pump system at 81 Kings Hedges Rd, Cambridge , UK. 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,
Daisy Kernick
Midstallations

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Quotation Document Required Attachments:

Quotation: *Quotation incomplete* →

Using the Quotation email as an example, when you click on the **Quotation** email option it will open a modal like the one shown above. The 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.

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