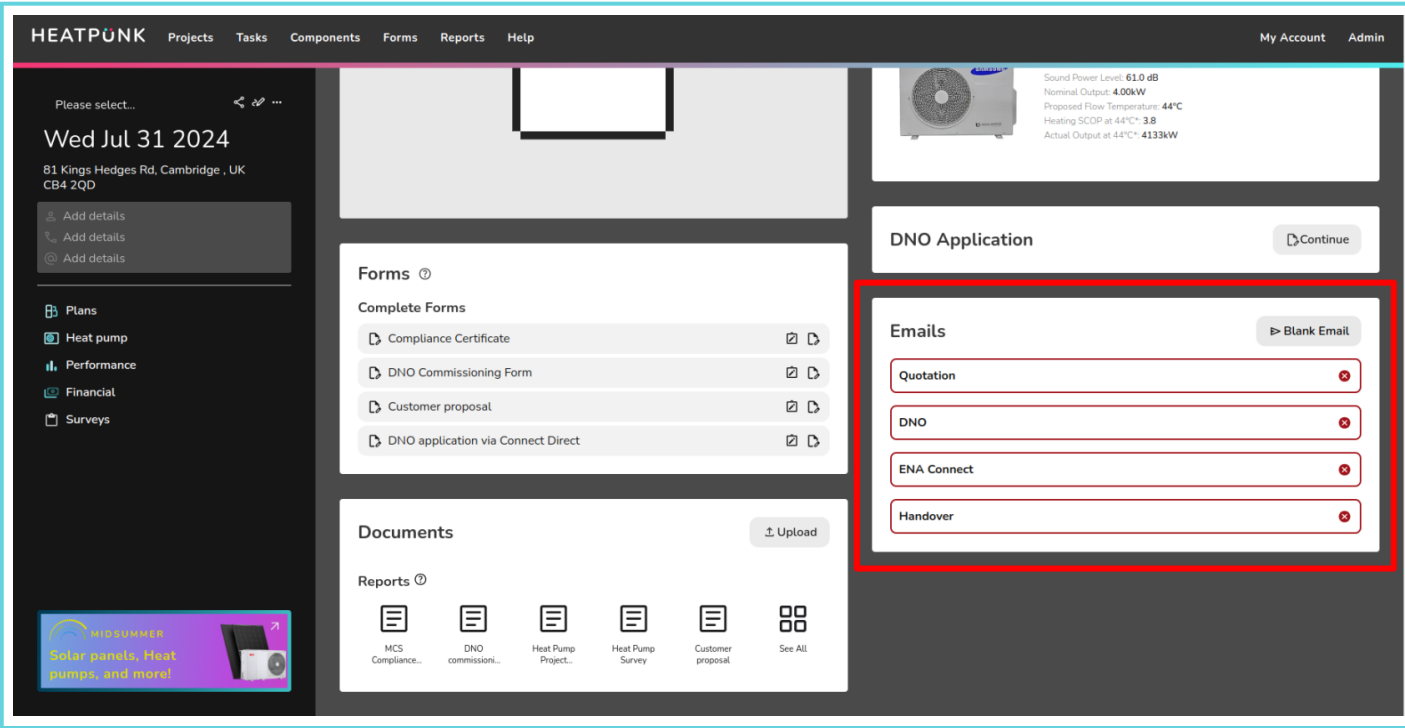


Sending emails from Heatpунк

You can access the email management section via the project overview. Here you can keep track of emails that have been sent. Emails highlighted red with a cross have not been sent yet.



Editing and sending an email

Send Email

To

+ Bcc

Cc

daisy.kernick@midsummerenergy.co.uk

Subject

Heat proposal for 81 Kings Hedges Rd, Cambridge , UK

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

↶ ↷ **B** *I* U ↺ ↻ ☰ ☷

Cancel

Send

Quotation Document Required Attachments:

Quotation:

Quotation incomplete

→

📎 Add attachments

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. More information on this, see our guide on [Document Management](#).

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 #3

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