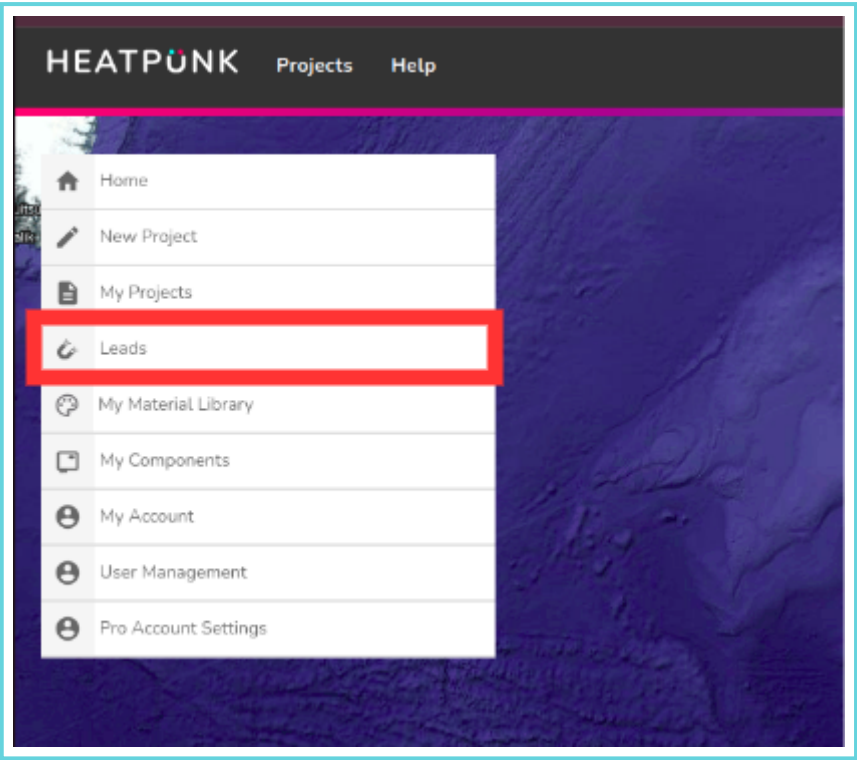


Leads Dashboard

Where to find your leads?

Leads that have been submitted through the Shrunk Punk tool can be located in the Leads tab on the Heat Punk homepage.

A screenshot of the 'Leads' dashboard in the HEATPUNK application. The page title is 'Leads', and there is a 'Home' link in the top right. Below the title is a pagination bar showing '1' as the active page, with links for 2, 3, 4, 5, and 9. A search bar is located below the pagination. The main content is a table with the following columns: 'Lead ID', 'Status', 'Address', 'Date Created', 'Customer Name', 'System Info', and 'Actions'. There are two rows of data. The first row has a 'Project' status and a 'Dismissed' status. The second row has a 'Dismissed' status. The 'Actions' column for each row contains a 'Prod' button and a right-pointing arrow button, which is highlighted with a red rectangular border.

| Lead ID | Status | Address | Date Created | Customer Name | System Info | Actions |
|---------|-----------|--------------------------|--------------|---------------|--------------------|----------|
| 327 | Project | 46 Humber Road, WRS 1LW | 06/11/2024 | Angus | 92.0 m² 5.2 kW | Prod ... |
| 326 | Dismissed | 70, Carlton Way, CB4 2DG | 06/11/2024 | Angus | 71.84 m² 4.5 kW | Prod ... |

To see the full details of the lead, click on the arrow button on the right hand side.

Following up leads

You can email your new leads directly through Heat Punk by clicking the contact 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

angus.baker@midsummerenergy.co.uk

+ Bcc

Cc

chelsea.showering@midsummerenergy.co.uk

Subject

Still interested in a heat pump quote?

A few days ago you used our heat loss estimator to check your house for suitability for a heat pump installation. We've not heard back from you yet, but if you would like to take up our offer of a price for installation of a heat pump we'd be delighted to help! Just let us know and we will get that underway as soon as we can.

If you'd rather not proceed with a heat pump quote at the moment, just let us know.

Chelsea Showering
Midsummer Energy

↶ ↷ **B** **I** U ↺ ↻ ⌵ ⌶

Cancel

Send

Report Email

Use the attachment tool to attach any other documents.

📎 Add attachments

You can also send a customer a 'quick quote' using the quick quotation tool.

PROJECT

60, Carlton Way, CB4 2DG

Quick Quote Tool

Welcome to the Quick Quotation Tool:

The property is currently operating with 3.35kW of heatloss to the externals and a floor area of 65 square meters

Static Costs:

| | | |
|---|--|--|
| Radiators | Cost per Radiator | Service |
| <input type="text" value="6"/> | <input type="text" value="£ 250.00"/> | <input type="text" value="£ 0.00"/> |
| Heatpump | Cost per Heatpump | Service |
| <input type="text" value="Vaillant..."/> | <input type="text" value="£ 4717.26"/> | <input type="text" value="£ Service"/> |
| Hot Water Storage | Cost for storage | Service |
| <input type="text" value="Samsung Cylinde..."/> | <input type="text" value="£ 1538.21"/> | <input type="text" value="£ Service"/> |

Additional Costs:

| | | |
|---|--|--------------------------------|
| <input type="text" value="Installation of heating sys..."/> | <input type="text" value="£ 4250.00"/> | <input type="text" value="-"/> |
| + Add Row | | |

Possible Costs:

[+ Add Row](#)[Back](#)☒ Map☐ EPC☐ Form☒ Heat loss☐ Quick Quote☐ History

Possible Costs:

[+ Add Row](#)

- ☐ Add a line for the £7500.00 BUS voucher to the quote
- ☐ This installation will qualify for zero-rated VAT

Summary:

| | |
|---------------------|------------|
| Static Costs | £ 7755.47 |
| Additional Costs | £ 4250.00 |
| Possible Costs | £ 0.00 |
| Grants | £ 0.00 |
| Total Costs | £ 12005.47 |
| VAT | 20.00 % |
| Total including VAT | £ 14406.56 |

[Email Lead](#)[Back](#)☒ Map☐ EPC☐ Form☒ Heat loss☐ Quick Quote☐ History

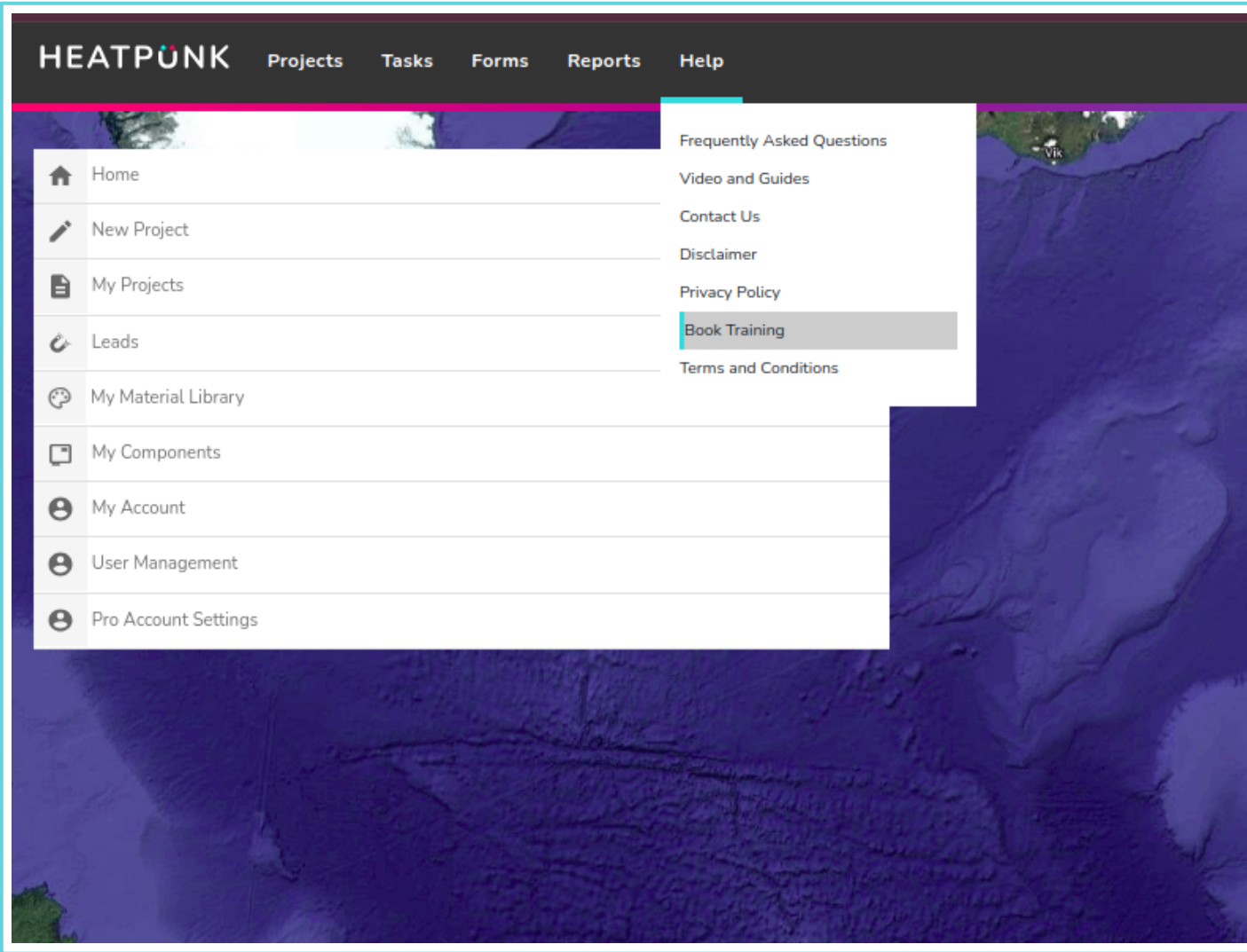
Converting leads to projects on Heat Punk

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

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!



Revision #1

Created 17 June 2025 14:12:19 by Daisy

Updated 17 June 2025 14:12:19 by Daisy