Solar CRM lead tracker

Quick start guide for the free Excel workbook

The companion workbook is blank and contains no real customer data.

1. Keep one row per enquiry

Use a unique Lead ID. Do not reuse it when a customer asks for another quote; add a new quote reference in the same lead row or duplicate the lead with a new ID if it is a genuinely separate job.

2. Set an owner

One person owns the next action. A blank owner means nobody can tell who should call.

3. Set the next action date

The dashboard counts open actions due today or earlier. Update the date after each conversation.

4. Move the stage

Choose a stage from the dropdown. Won and Lost are excluded from the open pipeline count.

5. Review every morning

Filter Action status to Overdue or Due today. Check the original notes before contacting the customer.

6. Protect the file

This workbook contains customer contact data once you use it. Limit access, back it up, and follow your own privacy process.

Column reference

Field	Use
Lead ID	Unique code for one enquiry
Stage	Choose from the dropdown
Owner	Person responsible for next action
Next action date	When the owner should act
Expected value	Optional estimate, not booked revenue
Action status	Calculated from stage and action date

A filled tracker contains customer contact details. Limit access, back it up and follow your privacy process.

This tracker does not calculate GST, subsidy, savings, payback or quotation totals.