Solar quotation tracker

Quick start guide for the Excel register

Before sending

Give the document a unique quote ID and revision. Check customer name, technical scope, price, taxes, payment terms and validity in the actual customer document.

After sending

Enter the sent date, file path, owner, status and one specific next action with a date.

When revising

Add a new row with the same quote ID and the next revision number. Keep the earlier row as a record of what was sent.

Each morning

Filter Action status to Overdue and Due today. Read the objection and last contact before calling.

Each week

Review quotes nearing their validity date and quotes with no next action. Do not assume expiry means a lost deal.

Protect data

A filled register contains customer and price information. Restrict access and back it up.

Field	Purpose
Quote ID + revision	Match the exact sent file
Valid until	Track the quoted validity date
Owner + next action	Make follow-up responsibility clear
Status	Record the outcome without guessing
Document path	Find the exact PDF sent

The workbook is an internal register, not a customer quotation or a GST/subsidy calculator.