



ReDREAM
change your energy

D2.1 First version of energy ecosystem

First version of the software to run the ecosystem

December 2021



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¹

PU = Public

PP = Restricted to other programme participants (including the Commission Services)

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Summary

REDREAM Project

The energy market is rapidly transforming, and so is the role of the Consumer. Yesterday's passive consumers are central actors in today's energy markets. As new prosumers, energy markets can benefit from their generation, consumption, and storage capabilities. The EU-funded REDREAM project will enable the effective participation of consumers and prosumers in the energy market. The project will develop a value generation chain strategy based on a revolutionary service-dominant logic in which services are exchanged. The project will foster the demand response tools and energy/non-energy services that enable consumers to participate in the energy market. This will lead to the establishment of a new concept: a connected user-centred energy ecosystem.

Deliverable Summary

This deliverable presents the first deliverable about the REDREAM Ecosystem that will be developed in WP2 and WP3. The REDREAM Ecosystem is made up of different layers (presented in the proposal) and platforms (platform can be defined as the group of interfaces, software services and databases that has a common functionality). Some aspects of the REDREAM Ecosystem will be explained in their own deliverable such as Interfaces in D2.3, Social Network D2.4, API in D2.5, Services in D3.X.... For this reason, this deliverable is focused on the REDREAM Ecosystem portal, known as the Community Flex portal in this project. Four REDREAM Ecosystem portals (one per each demo) went live in June 2021 and will continue to develop throughout the project lifespan and beyond.

The Flex Community portal is created to be a tool for the DEMO leaders to manage the consumers they have recruited, for installers to manage their installations, for consumers to interact with all the agents in the REDREAM Ecosystem. Additionally, the Flex Community portal has several services in the backend:

- Preselection tool, to select these consumers that are eligible for the REDREAM project (they must be quite flexible in their consumption).
- Offer of Energy Plans, where consumers can find different solutions to be onboard in the energy transition. It is a way to customize the offer of each DEMO to its influence region.
- Tool to profile consumers, to customize the offer to consumers.
- Onboarding tool, to easy and customize the adoption of the REDREAM Ecosystem. Very important for Demo leaders.
- Performance tool, where DEMO leaders (called Managers of the portal) can see the performance of each consumer in the Ecosystem.

This deliverable explains how the users of the portal can interact with each other and with these tools/services, explaining the complete journey (see next figure) for each of the users of the Ecosystem Platform: Managers (DEMO leaders), Consumers, Installers and Stem Energy as Aggregator. In this first deliverable, the up-to-date status of the Flex Community portal is presented, and its evolution will be shown in D2.2.



THE ECOSYSTEM JOURNEY



-  Stemy Energy
-  Manager
-  Customer
-  Installer



Table of acronyms

Acronyms	Description
ACS	Air Conditioning System
AP(s)	Action Point(s)
API	Application Programming Interface
CA	Consortium Agreement
EC	European Commission
ECP	Electric Charging Post
ECR	European Commission Reporting
EPOV	Energy Poverty Observatory
EV	Electric Vehicle
GA	Grant Agreement
GDPR	General Data Protection Regulation
H2020	Horizon 2020 programme
HBS	Household Budget Survey
DSO	Distribution System Operator
LTP	Linked Third Party
OAuth 2	Open Authorization
PC	Project Coordinator
PMB	Project Management Board
PTC	Project Technical Committee
RES	Renewable Energy Sources
TPR	Ten Percent Rule
TSO	Transmission System Operator
T&C	Terms & Conditions
UC	Use Case
UML	Unified Modelling Language
SILC	Survey on Income and Living Conditions
SOC	State of Charge
WP(s)	Work Package(s)

Terms	Description
REDREAM Ecosystem	The REDREAM Ecosystem is made up of different layers (presented in the introduction of this document), platforms and agents involved in the energy transition.
Platform	Platform is the software that manage one or more services. REDREAM Ecosystem has several platforms: mobility, energy and comfort platforms.
Portal	A web (front and back end) to interface with different agents in the REDREAM Ecosystem.
REDREAM Ecosystem Portal/ Community Flex Portal	Web to interface with different users of the REDREAM Ecosystem (named as Community Flex Portal).

Disclaimer

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1 Introduction

This deliverable is framed in task 1.1, which develops the foundations and skeleton of the energy REDREAM user-centric ecosystem. The Ecosystem is formed by the following five structural layers, shown in Figure 1:

1. Consumer engagement strategy: a holistic strategy to effectively engage the Consumer. This layer will be completed in T1.5.
2. Open co-creation: this layer is the entrance gate for consumers (app and webpage), installers (web), providers of energy technology (web), energy communities (web), scientific research (using open standard API) and energy resources (IoT). This layer will be completed in T2.2, T2.4 and T2.5.
3. Energy “social network”: an open place for consumers to share experiences and provide reliable and direct feedback. This layer will be completed in T2.3.
4. Virtualisation: it will generate new scenarios in the back-end to help the advisory tool make decisions through a consumer digital twin emulating the consumer’s behaviour with improvements. This layer will be completed in T2.6.
5. Open service pool with the catalogue of tools and services for the consumer grid. This layer contains the energy and non-energy services, gamification, and advisory tool. This layer will be completed in WP3.

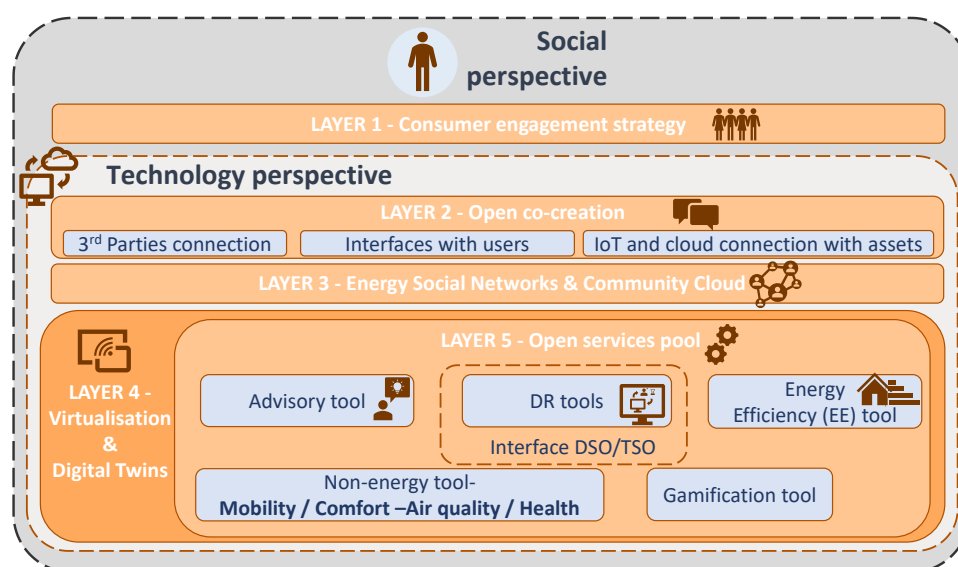


Figure 1: REDREAM ecosystem

This deliverable is focused on the explanation of the REDREAM Ecosystem portal (called Flex Community) with the following objectives:

- Implementation of a sign-up and onboarding process for the agents participating in the Ecosystem.
- Help in the selection of suitable consumers.
- Allow the flow of feedback for quality assessment and automatically send notifications to participants, especially consumers.
- Profile and customize the offer of consumers.

- Allow the interaction between different agents involved in the Ecosystem.

Stemy developed all these services in the past, and they have been used as a base to incorporate outputs from D1.1. The first versions of the websites presented in the following sections are the result of implementing this previous experience.

The different kinds of participants and the cultural specificness of the demo countries represent one of the biggest challenges of the REDREAM Ecosystem portal development. Furthermore, the website's layout follows a responsive design, which means that the page's outline adapts to the screen size of the different accessing devices. A web page design for each participant is required to achieve an inclusive portal and encourage them to use it, avoiding complex messages, as stated in D1.1.

One of the critical things to make the portal easy to use is the language. Four different REDREAM Ecosystem portals (Figure 2) have been developed to accommodate the use of the respective national languages. Current portals are deployed in:

- Spanish Ecosystem: comunidadflex.es
- Italian Ecosystem: stemyenergy.it
- British Ecosystem: stemyenergy.co.uk
- Croatian Ecosystem: <https://web-ecosystem-p1hr-dot-stemy-webs-eu.appspot.com/>

By the time of this deliverable, Croatian translations have some issues and Croatian team is working on it. In addition, Croatian link will be updated for D2.2.

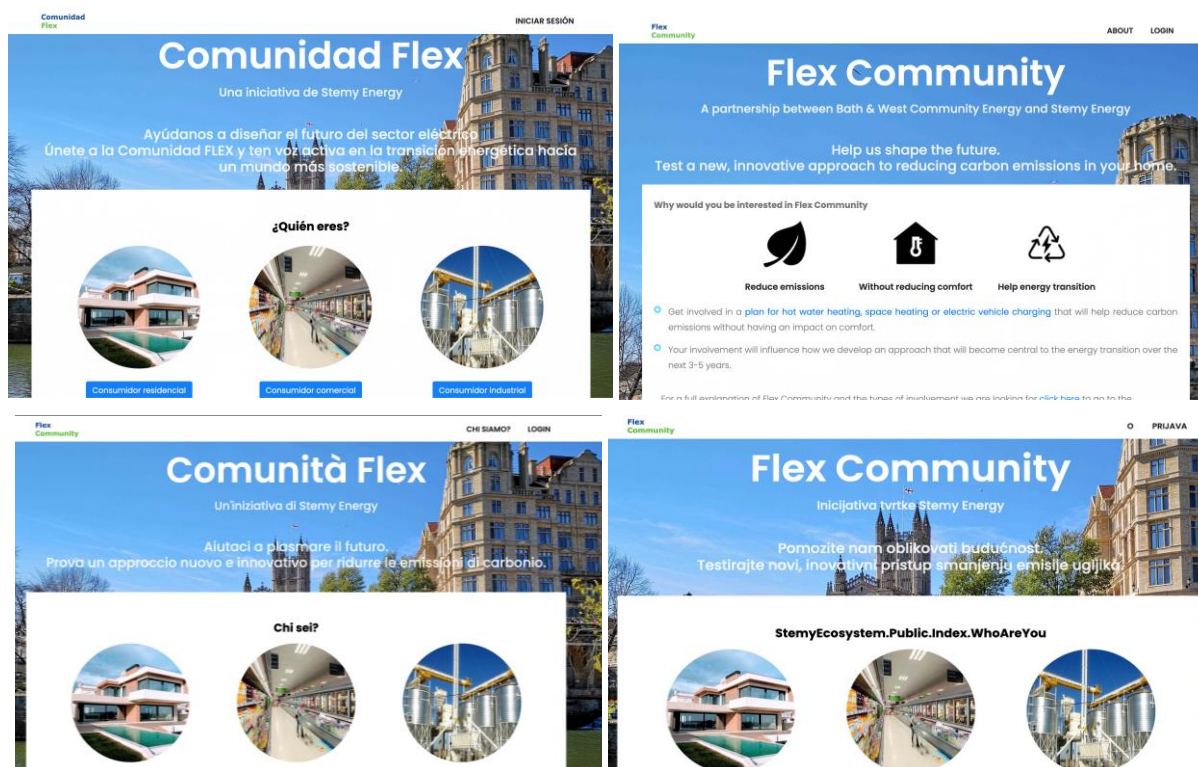


Figure 2: Ecosystem Landing Pages

This deliverable captures a static photograph of the portal that is constantly evolving with the feedback of demo leaders and social partners in REDREAM. The evolution of this portal will be seen in the second deliverable (D2.2 in M21) of task 2.1.



2 Main Agents and their functionalities in the Ecosystem

This section analyses the use case and the needs that derive from it. These functionalities will be high level and business-oriented. As a summary, this section will answer the question of why the Ecosystem is needed.

Three main agents are interacting in the Ecosystem:

1. **Consumer:** any user who wants to participate and enable flexibility services through energy technology.
2. **Energy Community or Manager:** an agent in charge of attracting new consumers and managing the installation process. In this case, the Demo Leader will play this role.
3. **Installer:** appointed installer who will oversee installing the Stemy or Third-Party Equipment designated to each solution.

The main functionalities of each of them are listed in the following table:

Consumer	Energy Community or Manager	Installer
Register in the Portal	Define a Commercial Strategy	Register in the Portal
Complete their Profile	Invite Consumers and Installers	Invite other Consumers and Installer-users
Apply for a Plan	Review Consumer information and suitability: Profile and Plans Survey	Create work teams
Sign Terms and Conditions	Accept or reject Consumers	Check their calendar
Invite other consumer users (e.g. other family members)	Assign Installers	Schedule installation visits
	Choose a quote	Review Consumer information: Profile, Survey Answers, and photos
	Send Equipment	Manage Consumer status
	Check their Calendar	Create and upload quotes
	Check the KPIs dashboard	Register and activate equipment
	Fill in Survey Plans for Consumers	
	Write comments	
	Review Consumer Status	
	Manage maintenance visits	

Table 1 Main functionalities of each agent



3 Community Flex Portal structure

This section explains how the Ecosystem is structured and describes the different screens that participants would access depending on the type of user.

First, the Consumer Portal is explained in section 3.1, followed by the Energy Community or Manager Portal in section 3.2, and the Installer Portal in section 3.3. Each of these sections contains screenshots of the interfaces and the navigation flow.

3.1 Consumer Portal

The Consumer Portal is structured in different sections (Figure 3), which are accessed through the side navigation bar as described below:

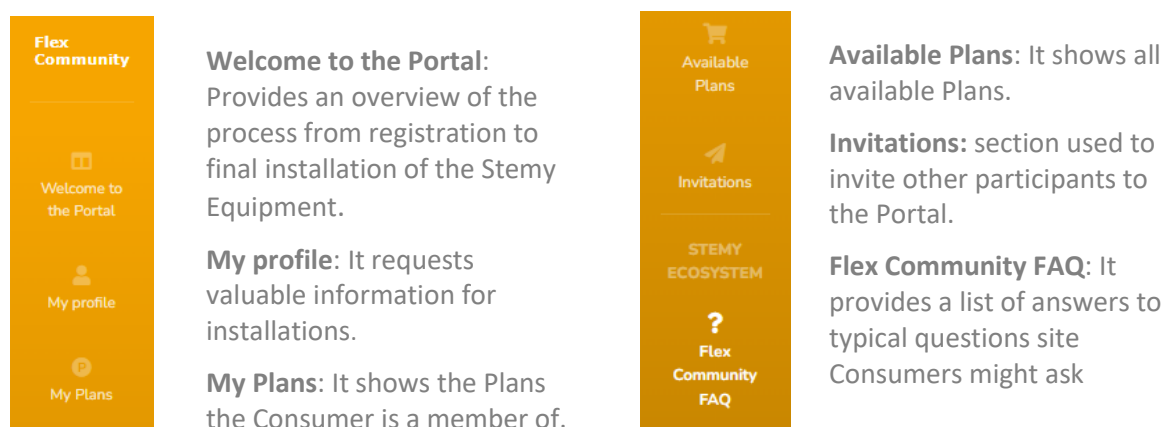


Figure 3 Consumer: List of interfaces

3.1.1 Welcome to the Portal

The Welcome page gives to the Consumer an overview of the whole engagement process from registration to the final installation of Stemy's Equipment. Its main objective is to assist step by step the consumers in their journeys.

Figure 4 presents the three main sections of the 'welcome page' dedicated to the attention of the Consumer:

- **Section A:** If Consumers are not members of any plan, they will see button A which says "Check out available plans" for the Consumers to see the different Plans offered in the Portal. If Consumers are members of a plan, they will be able to see them from this area, and by clicking in "Go to my Plan", they will be able to learn more about the specifications of that Plan.
- **Section B:** This area includes an explanation of how to navigate the portal and the contact details Consumers can refer to if they need help.
- **Section C:** This area shows the global portal journey shows the overall process at a glance, evolving as the Consumer completes each step. This journey may vary for each Demo country, including or eliminating specific steps.

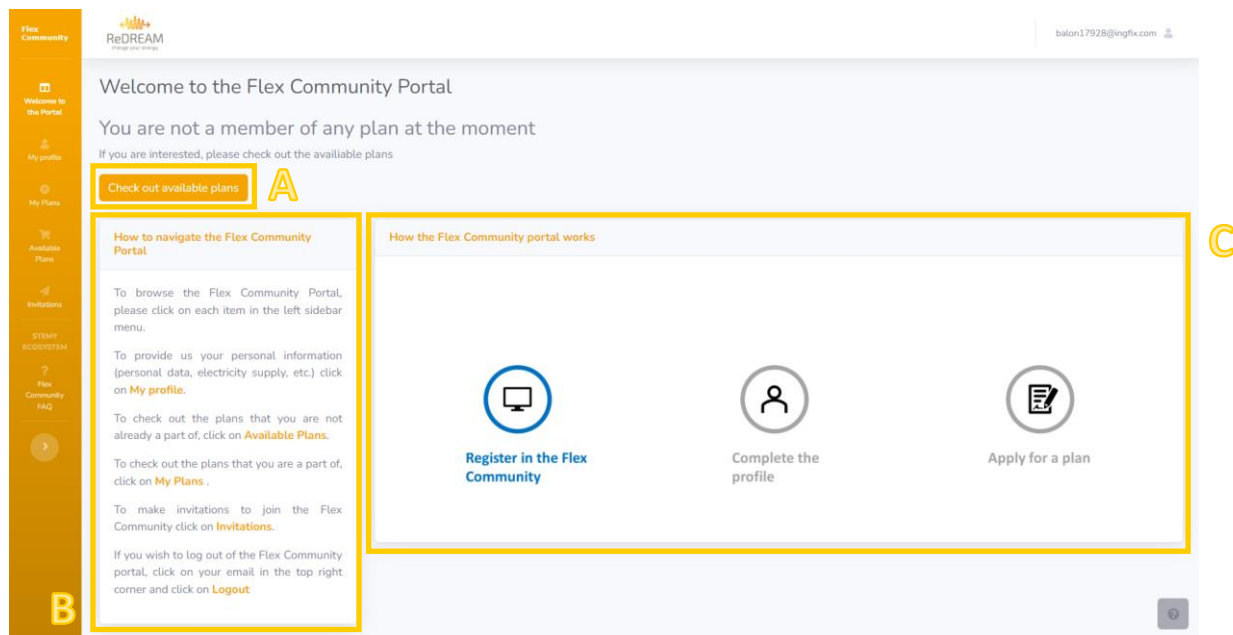


Figure 4 Consumer: Welcome to the Portal

3.1.2 My profile

My Profile section is made up of different categories of questions that provide valuable information for Installers and Energy Communities/Managers to succeed in any future installation of a device.

The information provided in each category helps Installers have a general idea of the characteristics of each installation and helps Stemy better assess the Consumers' profile before becoming a member of the community. Information about bills and electrical characteristics of devices will be need it for it.

By splitting the information into categories and informing Consumers of their progress in each questionnaire, we manage to simplify the buying process without compromising the goal of successful installations. Additionally, each questionnaire shows a progress bar aimed at managing the Consumers' expectations.

In the **My Profile** screen (Figure 5), we can differentiate seven areas:

ZONE A: In this area, a progress bar shows the percentage of completion of the different sections shown below. It is intended to help Consumers know what their overall progress has been on **My Profile**.

ZONE B: This button will take Consumers to the section where they will be asked to provide **primary personal data** (name, address, phone number...).

ZONE C: This button will take Consumers to the section where they will be asked to answer some questions aimed at assessing their **energy efficiency** (insulation, double glazing...).

ZONE D: This button will take Consumers to the section where they will be asked to describe the **characteristics of their property** (size, age, property type, etc.) to better adapt the solution to their specific needs.

ZONE E: This button will take Consumers to the section where they will be asked to provide information about their **internet connection** to ensure the optimal functioning of the Stemy Equipment.

ZONE F: This button will take Consumers to the section where they will be asked to describe their **electricity supply** (supplier, type of tariff, etc.) to give them recommendations to reduce their energy spending.



ZONE G: This button will take Consumers to the section where they will be asked to answer specific questions regarding the **installation** and their technology interests.

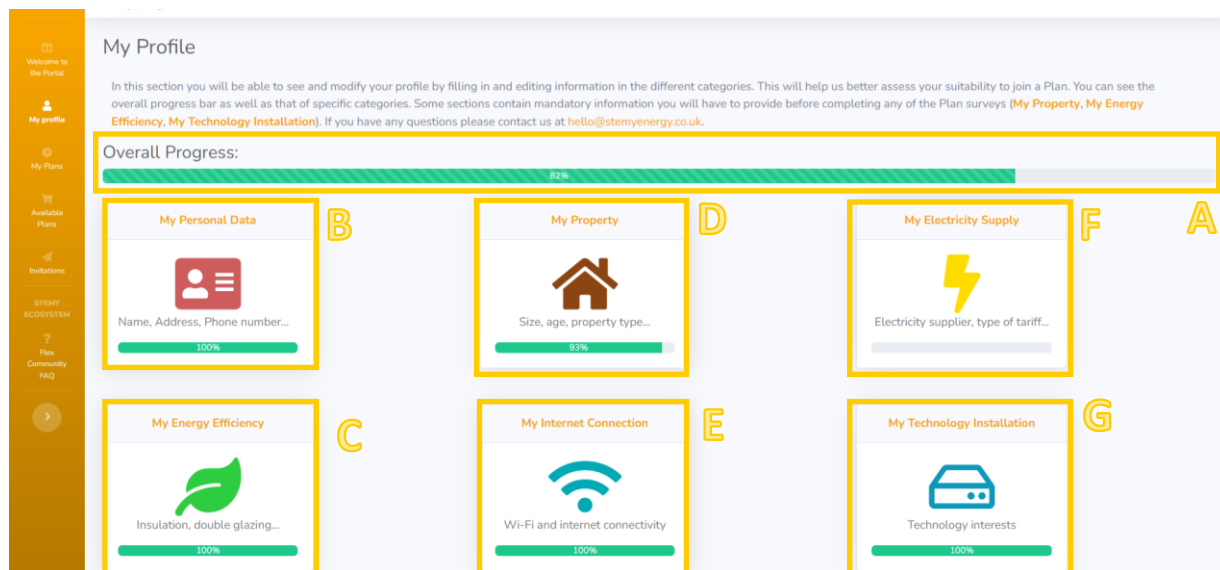


Figure 5 Consumer: My profile

As discussed in D1.1, the profile display is different for each type of Consumer, so a Residential Consumer will not see the same questions as a Commercial Consumer or an Industrial Consumer.

3.1.3 Available Plans

In the **Available Plans** section, the Consumer can find the different Plans offered in the portal.

A Plan is a process aimed at offering a specific service. It contains a set of specific questions in each Plan, which are crucial to assess whether a Consumer is accepted to become a member of the community and to define a solution for each accepted Consumer.

For now, only the Flex Plan is available in each Demo country, but that does not mean more Plans cannot be offered. For example, in the UK extra plans are available in addition to the Flex Plan, although they go beyond the project's goals. Some examples are the Heat Pump Plan or the EVCP Plan, both oriented to the installation of these technologies.

All Plans can be customised according to the needs of each Demo, e.g. by modifying questions, adding new Plans and adapting to the cultural norms of each country.

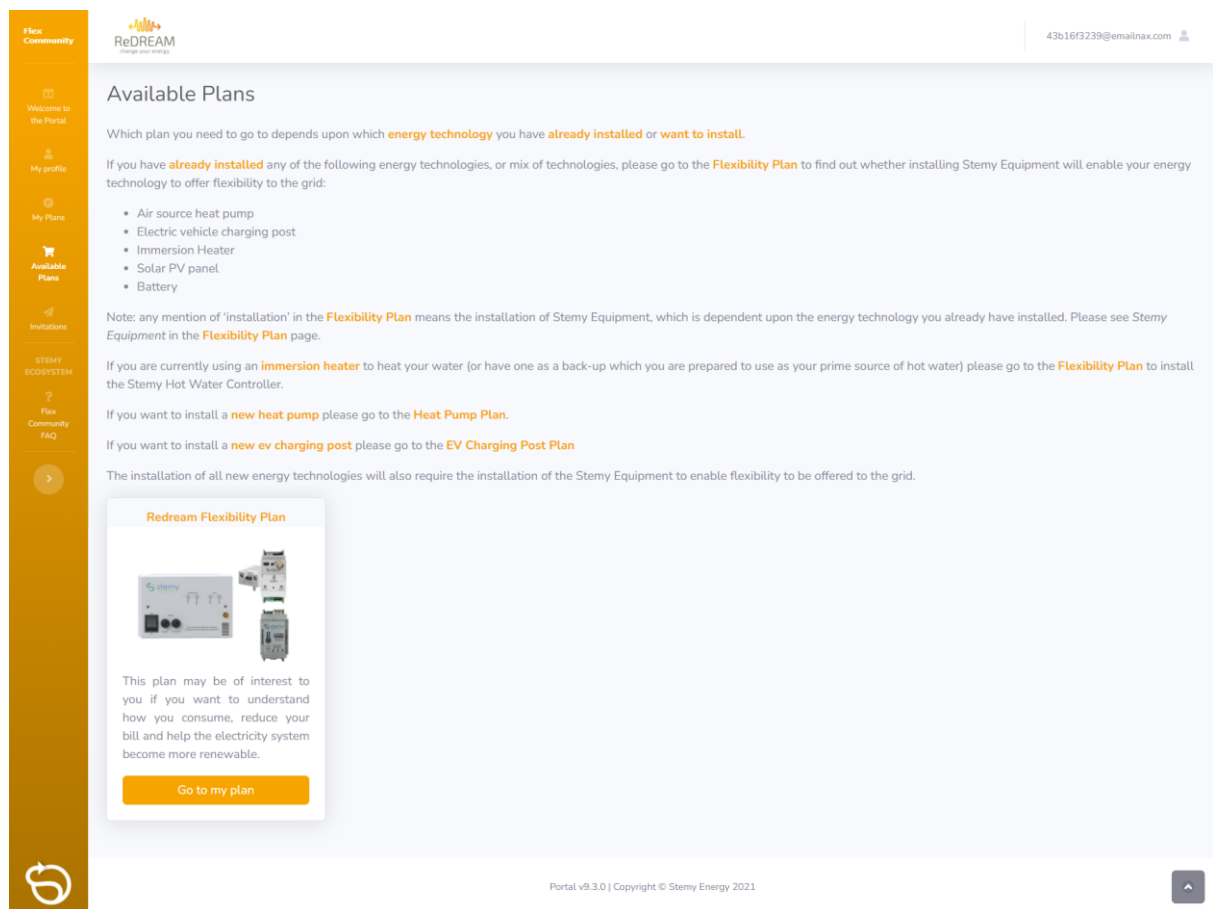


Figure 6 Consumer: Available Plans

3.1.4 My Plans

The complexity of the offered services demands a different buying experience, which in this case is embodied in other Plans containing different sets of questions. **My Plans** section shows the Plans of which the Consumer is a member.

As indicated in D1.1, each type of Consumer has different needs and therefore the Plans are tailored to each type of Consumer. For example, a Residential Consumer may not be offered the same Plans as an Industrial Consumer, and the questions asked in a Flexibility Plan are not the same for a Commercial Consumer as for an Industrial Consumer.

Through these questionnaires:

- Installers get relevant information about Consumers, helping them evaluate the needs of each installation.
- Stemy gets crucial data to the assessment of whether each Consumer is suitable for a specific Plan. The data provided in this section are also relevant for grant applications.
- Consumers can, in a simple way, provide the portal with all the information needed to assess their profile and complete the installation.

By clicking on “Go to my Plan” Consumers can access the screen shown in Figure 7. All actions necessary for a successful installation are listed in this section.

They are split into three different areas:



- **Section A:** In this area, there is a general explanation of what is offered in this Plan and an interactive journey showing the progress of the Consumer within the Plan. The journey varies depending on the specific characteristics of each Plan and evolves as the Consumer progresses through its steps.
- **Section B:** The buttons in this area will take the Consumer to the actions needed in each step. It also includes a section solving frequently asked questions and further information regarding Stemy Equipment.
- **Section C:** This section will guide the Consumer during the whole process by displaying the specific information of the next step.

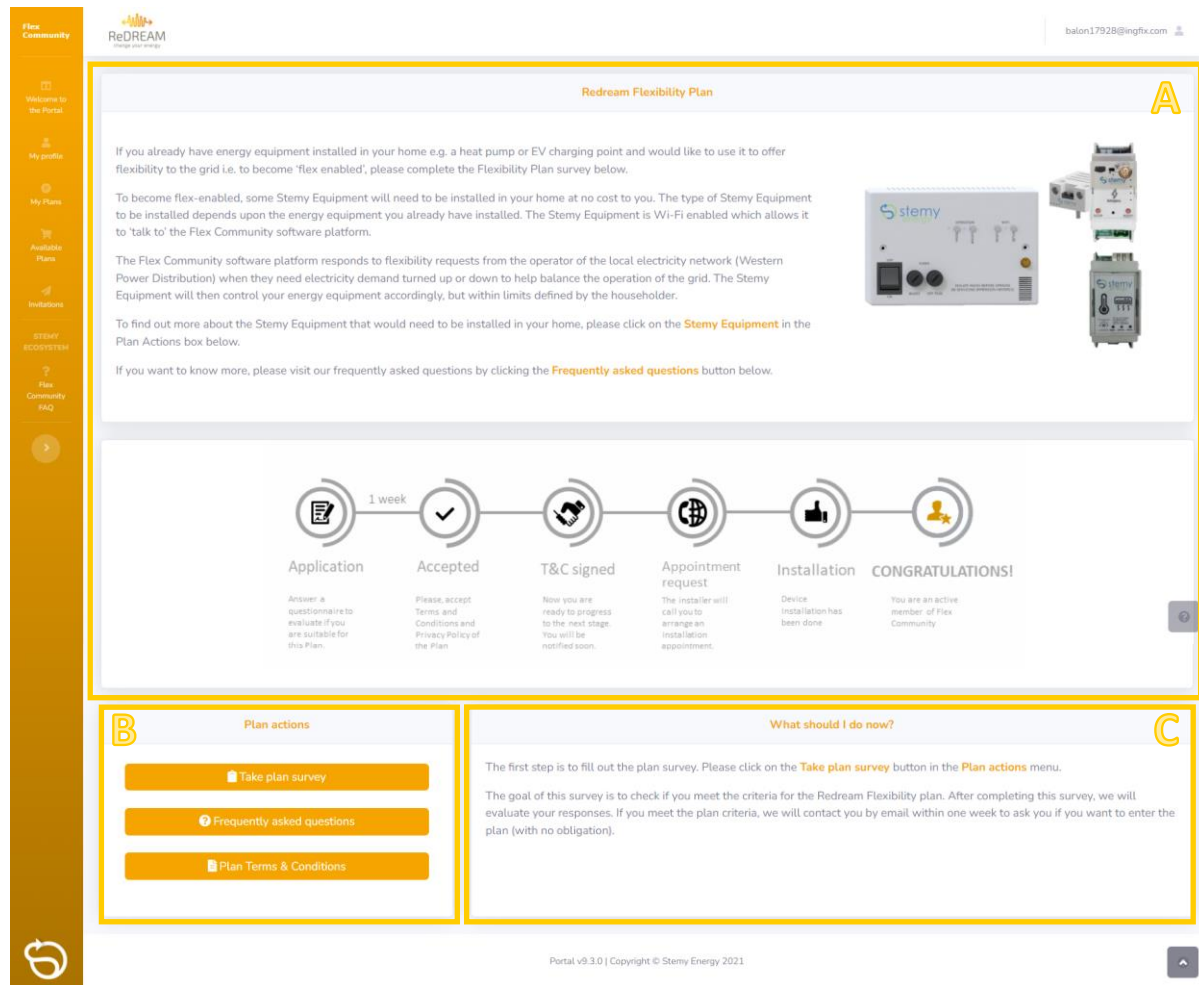


Figure 7 Consumer: Example of a plan

3.1.5 Invitations

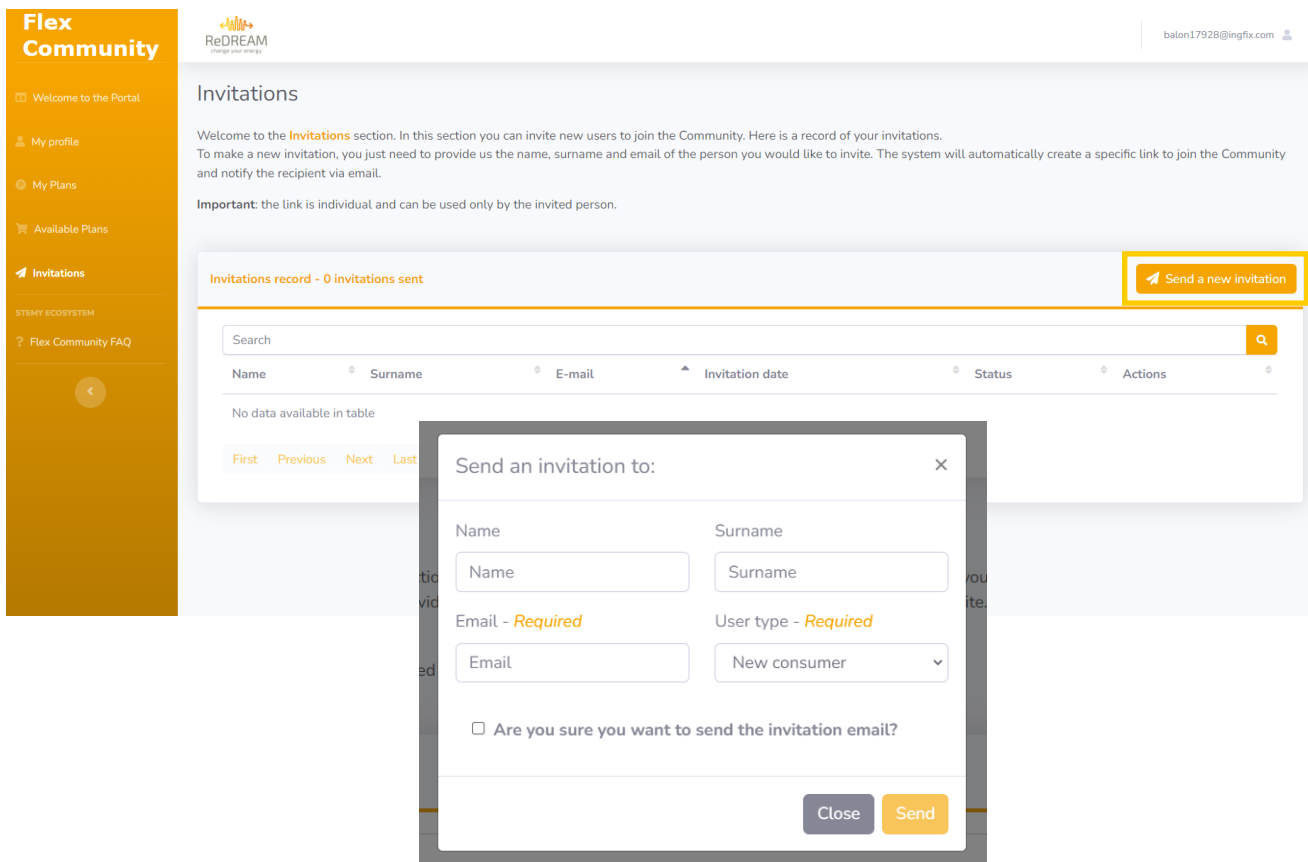
In this section, Consumers will be able to invite other Consumer-users to the portal. This way, they would also be able to use the App and control Stemy devices.

This section is particularly relevant as it enables and supports the growth of the community. The Consumer can invite New/Linked Consumers. They, in turn, can invite other Consumers, contributing to the development of the community.

To generate an invitation (Figure 8), the Consumer must click on the button “Send a new invitation” in section A and specify the type of participant he/she is inviting and some additional information such as email and name. An automatic email will be sent to the participant to register.



If the participant has not registered within a few days, the Consumer can send the invitation again as a reminder.



The screenshot shows the 'Flex Community' portal interface. On the left is an orange sidebar with navigation links: 'Welcome to the Portal', 'My profile', 'My Plans', 'Available Plans', 'Invitations' (highlighted), 'STEHY ECOSYSTEM', and 'Flex Community FAQ'. The main content area is titled 'Invitations' and includes a welcome message and instructions. A table header for 'Invitations record' shows '0 invitations sent'. A yellow button 'Send a new invitation' is in the top right. A modal form titled 'Send an invitation to:' is open, containing fields for 'Name', 'Surname', 'Email - Required', and 'User type - Required' (a dropdown menu set to 'New consumer'). There is a checkbox 'Are you sure you want to send the invitation email?' and 'Close' and 'Send' buttons at the bottom.

Figure 8 How to send an invitation to a participant?

3.1.6 Frequently Asked Questions (FAQ)

As with any other website, the FAQ section (Figure 9) refers to a list of answers to typical questions site Consumers might ask.

The questions shown in this section will vary for each type of Consumer (Residential, Commercial and Industrial) adapting to its needs. In this case, they give clarity around the **concept of flexibility**.

By clicking on the different questions, the Consumer will be able to see each answer. They will provide a clearer idea of each concept and solve generic doubts about the company and the portal.

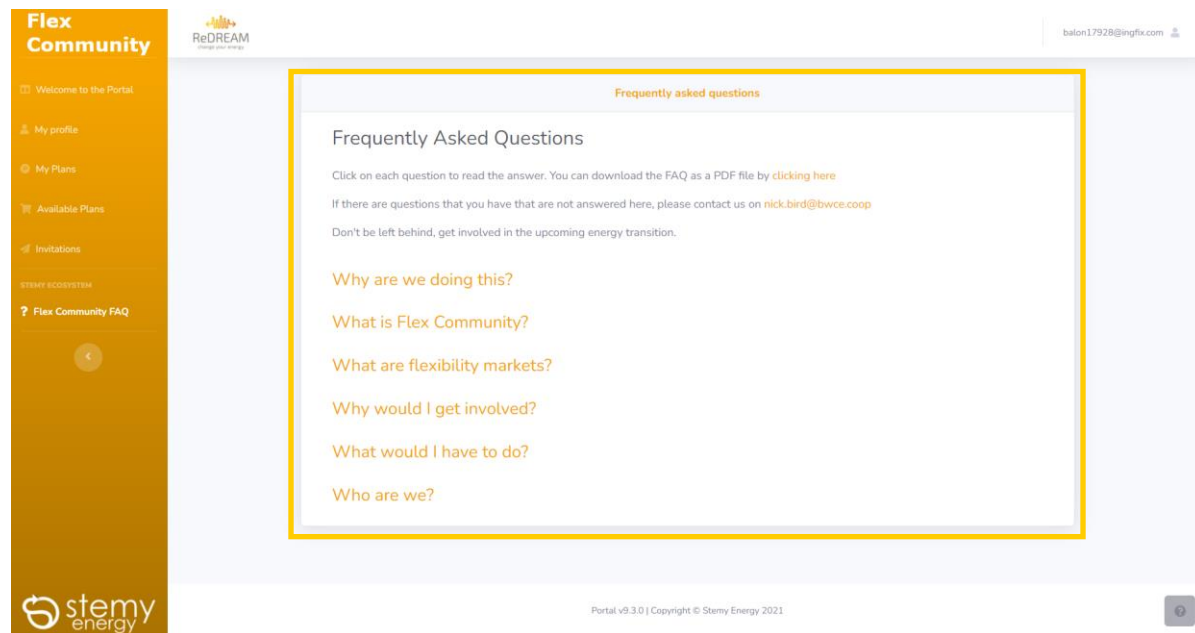


Figure 9 Consumer: FAQ

3.2 Energy Community or Manager Portal

The Energy Community and/or the Manager have access through their portal to the management of the installations and the monitorization of the whole process. It is structured in different sections, which are accessed through the side navigation bar as described in figure 10.










<p>Flex Community</p> <hr/> <p>CANDIDATES</p> <p> Survey answers</p> <p> User profiles</p> <hr/> <p>USER OPERATION</p> <p> Current users</p> <p> Incoming users</p>	<p>Survey answers: it shows Consumers' answers to the Survey Plans. The manager will accept/reject the Consumer in this section.</p> <p>User profiles: it shows the information related to the Consumer Profile.</p> <p>Current users: provides a list of all the Consumers who already have equipment installed.</p> <p>Incoming users: it shows Consumers who are in the process of completing a Plan and installing any equipment.</p>	<p> Leaving users</p> <p> Invitations</p> <hr/> <p>INSTALLERS</p> <p> Upcoming installations</p> <p> Registered installers</p> <hr/> <p>DASHBOARD</p> <p> Dashboard KPIs</p>	<p>Leaving users: provides a list of Consumers who have left the Plan.</p> <p>Invitations: section used to invite other participants to the Portal.</p> <p>Upcoming installations: calendar with all the events and installations scheduled.</p> <p>Registered installers: lists all the registered and active installers in the Portal.</p> <p>Dashboard KPIs: a general informative panel about the status of Consumers in relation to consumption and energy.</p>
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Figure 10 Manager: List of interfaces

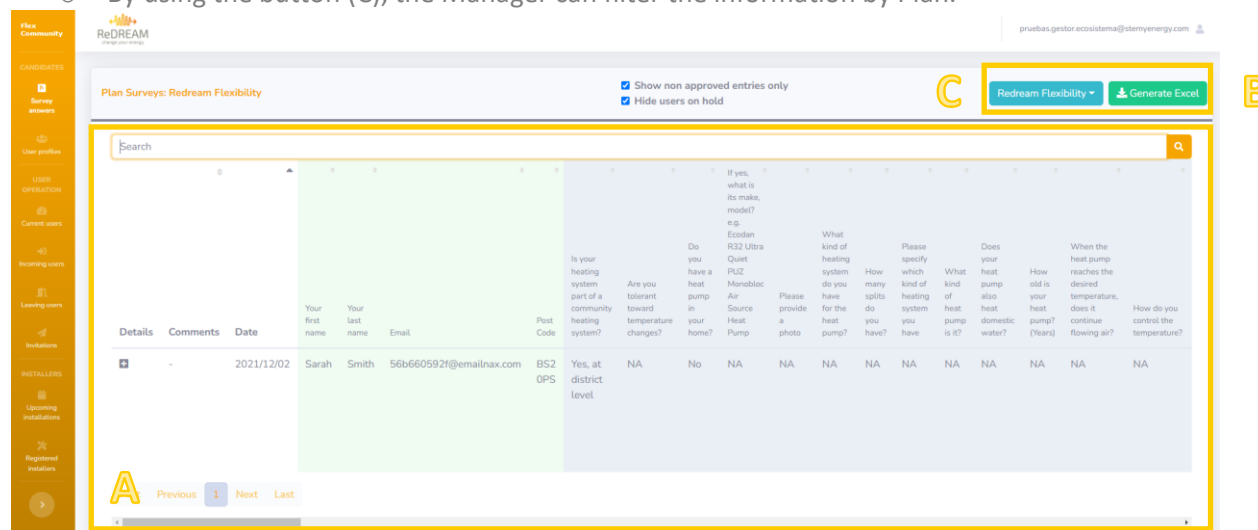


3.2.1 Survey answers

In this section, the Energy Community and the Manager will be able to check and review consumers' answers to the Plan Survey. These answers will inform Energy Community/Managers and Installers about the technologies and energy characteristics of the Consumer, as shown in Figure 11.

The collection of this information is very valuable for Stemy and the Energy Community/Manager, as it allows for a detailed assessment of the suitability of each Consumer to join a specific Plan. In addition, this data helps Installers obtain relevant information for the installation without the need to visit the installation site of their Consumers.

- As the Manager scrolls right, he/she will find the different provided answers, sorted by Consumer and Plan. By clicking on the “+” icon (A), the Manager can check the images uploaded by the Consumer and finally ‘**Approve**’ them to join the Plan.
- If the Manager wishes to export the answers in a spreadsheet, they must click on the “Generate Excel” button to download them. (B)
- By using the button (C), the Manager can filter the information by Plan.



The screenshot shows the 'Plan Surveys: Redream Flexibility' interface. On the left is a sidebar with navigation options: Home, Survey answers, User profile, User registration, Current users, Booking users, Leaving users, Installations, Upcoming installations, and Registered installation. The main area displays a table of survey results for a user named Sarah Smith. The table has columns for Details, Comments, Date, and various survey questions. A search bar is at the top. Filter buttons 'Redream Flexibility' and 'Generate Excel' are on the right. Navigation buttons 'Previous', 'Next', and 'Last' are at the bottom of the table.

Details	Comments	Date	Your first name	Your last name	Email	Post Code	Is your heating system part of a community heating system?	Are you tolerant toward temperature changes?	Do you have a heat pump in your home?	If yes, what is its make, model? e.g. Ecoblen R32 Ultra Quiet PLUZ Monobloc Air Source Heat Pump	Please provide a photo	What kind of heating system do you have for the heat pump?	How many splits do you have?	Please specify which kind of heating system you have	What kind of heat pump is it?	Does your heat pump also heat domestic water?	How old is your heat pump? (Years)	When the heat pump reaches the desired temperature, does it continue flowing air?	How do you control the temperature?
+	-	2021/12/02	Sarah	Smith	56b660592f@emailnax.com	BS2 OPS	Yes, at district level	NA	No	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA

Figure 11 Manager: Survey answers

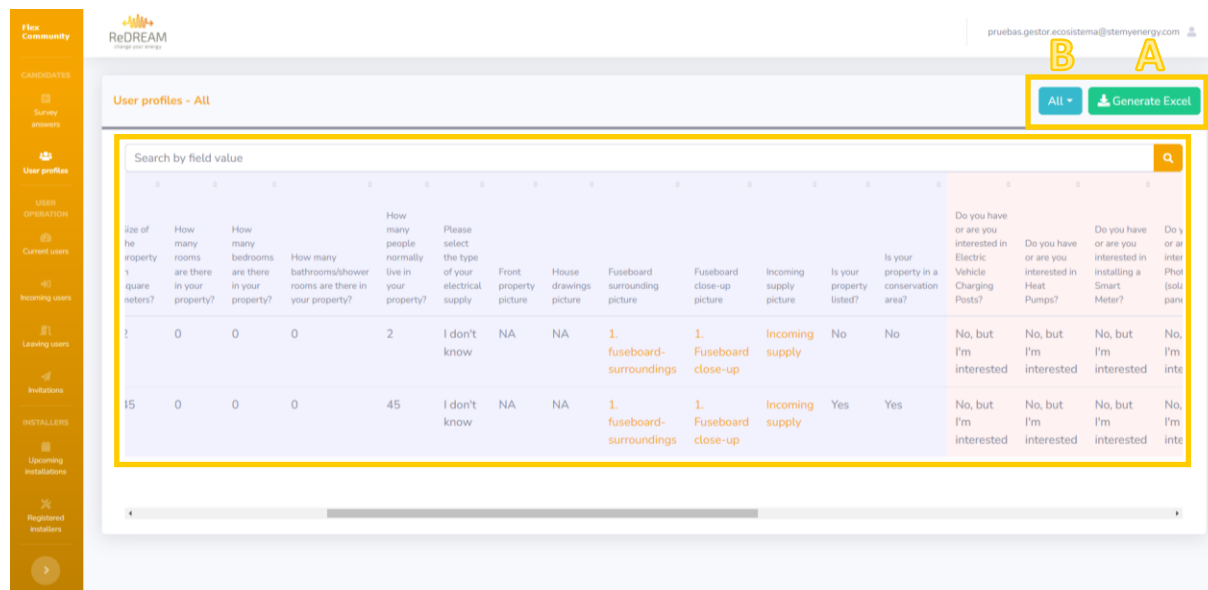
3.2.2 Consumer-User profile

This section provides valuable basic energy information about the Consumer that serves different purposes.

On the one hand, Stemy and the Energy Community/Manager can learn more about each Consumer and can offer them the Plan that best suits their needs. It also allows for a complete assessment of the Consumer's suitability to be part of the community and provides the necessary information to apply for subsidies. On the other hand, the installer has access to general Consumer energy information (Figure 12), which helps make successful installations more efficiently, without the need to contact or visit the Consumer.

- As the Manager scrolls right, he/she will find the different answers and photos colour-coded function of the Consumer Profile.
- If the Manager would like to have these answers in a spreadsheet, the Manager can also click on the “Generate Excel” button to automatically download these. (A)
- To filter the information by Plan, use (B).





User profiles - All

Search by field value

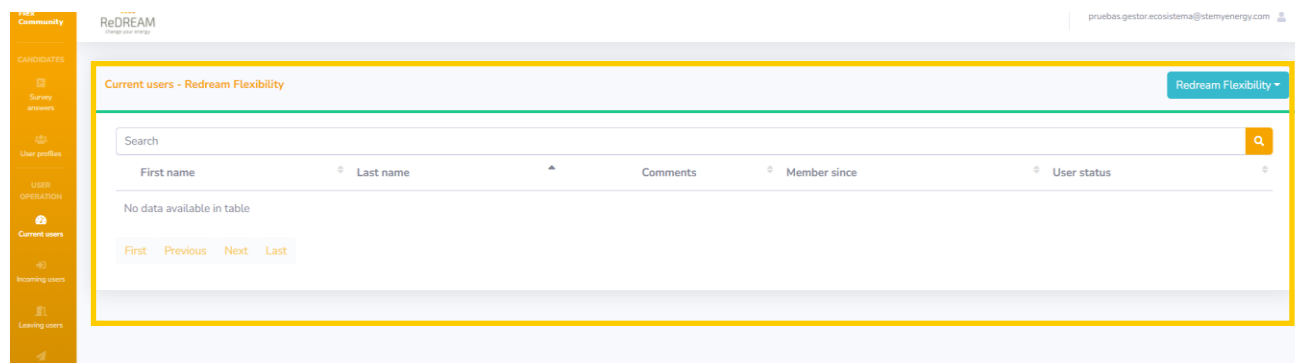
Size of the property in square meters?	How many rooms are there in your property?	How many bedrooms are there in your property?	How many bathrooms/shower rooms are there in your property?	How many people normally live in your property?	Please select the type of your electrical supply	Front property picture	House drawings picture	Fuseboard surrounding picture	Fuseboard close-up picture	Incoming supply picture	Is your property listed?	Is your property in a conservation area?	Do you have or are you interested in Electric Vehicle Charging Posts?	Do you have or are you interested in Heat Pumps?	Do you have or are you interested in installing a Smart Meter?	Do you or are you interested in interconnecting with the grid?
?	0	0	0	2	I don't know	NA	NA	1. fuseboard-surroundings	1. Fuseboard close-up	Incoming supply	No	No	No, but I'm interested	No, but I'm interested	No, but I'm interested	No, I'm interested
15	0	0	0	45	I don't know	NA	NA	1. fuseboard-surroundings	1. Fuseboard close-up	Incoming supply	Yes	Yes	No, but I'm interested	No, but I'm interested	No, but I'm interested	No, I'm interested

Figure 12 Manager: Consumers Profile

3.2.3 Current Consumer-User

In this section, the Energy Community and/or Manager will find a list of all the Consumers who have completed the installation process sorted by Plan.

The purpose of the screen, in Figure 13, is to monitor Consumers who are already a part of the community, as well as to receive feedback to improve the Consumer experience and solve any problems they might encounter.



Current users - Redream Flexibility

Search

First name	Last name	Comments	Member since	User status
No data available in table				

First Previous Next Last

Figure 13 Manager: Current Consumer

3.2.4 Incoming Consumer-User

This section provides the Energy Community and/or the Manager with an overall view of the status of Incoming Consumers (Figure 14). Through this screen, they can manage and monitor the installation process of all new Consumers and access the main functionalities responsible for the completion of an installation, e.g., assign Installers or create solutions.

On the screen, the Manager can differentiate two different areas:

- In section (A), the Manager will have a **general view of the status** of each Consumer and of his/her **pending actions**, e.g. sign T&Cs, upload photos, etc. These are the different possible statuses:

0. On hold. The Consumer has been set "on hold" due to survey answers.

0. Consumer rejected all solutions. The Consumer has rejected all the proposed solutions and exited the Plan.

1. Waiting to be approved. The Consumer has completed the survey and is waiting to be approved by the Energy Community/Manager.

2. Consumer must sign T&C. The Energy Community/ Manager has approved the Consumer to join the Plan. He/she must sign Terms & Conditions.

3. Stemy must create a solution.

4. Installer(s) must be assigned. The solution has been created, so the Energy Community/Manager must assign Installers to the Consumer's solution.

5. Installer(s) assigned. Waiting for final quote. The assigned installer must upload the final quote.

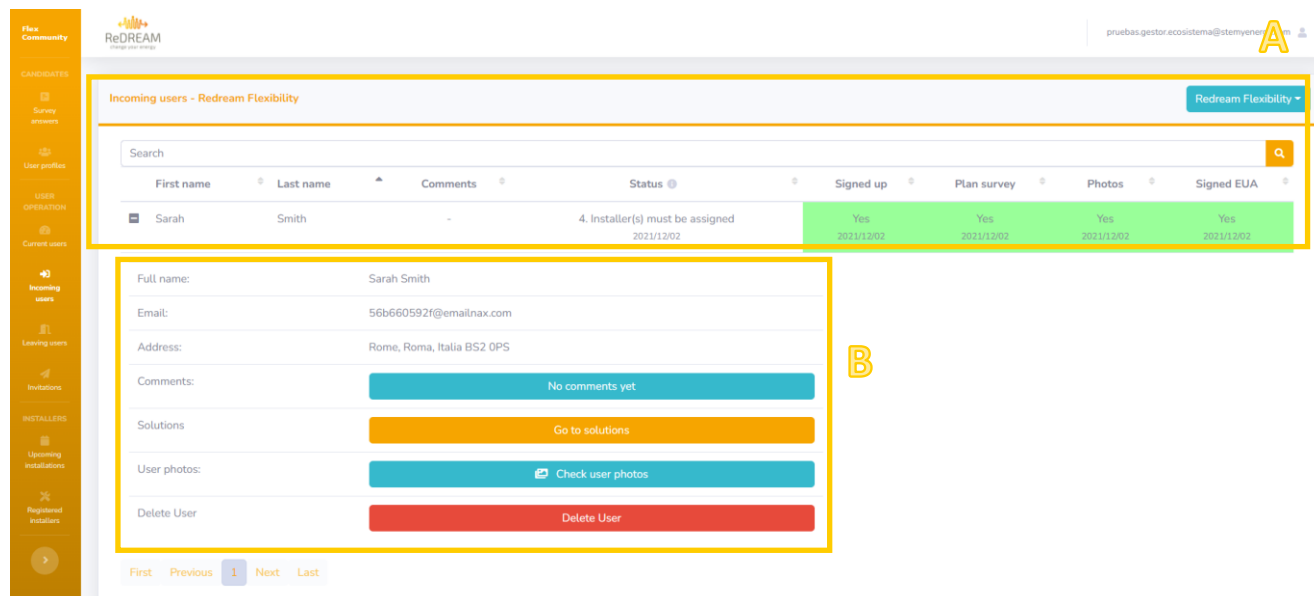
6. Pending final quote approval. All the final quotes are available. The Energy Community/Manager may select the most suitable one.

7. Pending installation visit. The Energy Community/Manager have selected the most suitable solution. The selected installer must schedule an installation visit by contacting the Consumer.

8. Installation visit scheduled. The selected installer has scheduled an installation visit.

- In section (B), the Energy Community/Manager will find different buttons through which they can **manage the installation process** by providing certain information or executing the necessary actions:

- **Information about the Consumer:** email, name, address, etc.
- **Comments section:** This allows establishing communications between the Manager and Stemy.
- **Solution section:** check the specific solution for the Consumer, assign Installers, etc.
- **Check consumer-user photos:** informative photos of the Consumer energy characteristics
- **Delete consumer-user button:** moves the Consumer to the "Leaving Consumers" page in case the Consumer will no longer participate in the Plan.



The screenshot displays the 'Incoming users - Redream Flexibility' section of the ReDREAM Manager interface. On the left, a sidebar lists various navigation options. The main area features a table of incoming users. One user, Sarah Smith, is highlighted. Below the table, a detailed view of the user's information is shown, including their full name, email, address, comments, solutions, user photos, and a delete user button. A yellow box labeled 'B' highlights the management buttons for the user.

First name	Last name	Comments	Status	Signed up	Plan survey	Photos	Signed EUA
Sarah	Smith	-	4. Installer(s) must be assigned 2021/12/02	Yes 2021/12/02	Yes 2021/12/02	Yes 2021/12/02	Yes 2021/12/02

Full name: Sarah Smith
 Email: 56b660592f@emailnax.com
 Address: Rome, Roma, Italia BS2 OPS
 Comments: No comments yet
 Solutions: Go to solutions
 User photos: Check user photos
 Delete User: Delete User

Figure 14 Manager: Incoming consumers

3.2.5 Leaving Consumer-User

Through this section, the Energy Community and/or Manager will access a list of Consumers who have requested to leave a Plan (Figure 15).

Similar to how an installation is managed, this section will provide the Energy Community/Manager with an overview of the current uninstallation status of each Consumer and will allow them to monitor and manage the whole uninstallation process in future developments.

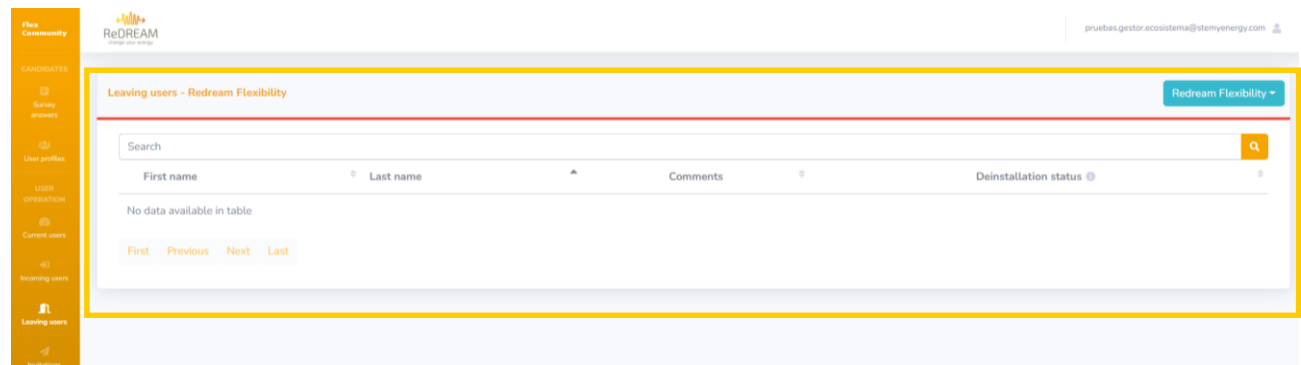


Figure 15 Manager: Leaving Consumers

3.2.6 Invitations

The Energy Community/Manager can send out invitations to join the community (Figure 16).

This section is particularly relevant as it enables and supports the growth of the community. The Energy Community/Manager can invite new Installers and/or new Residential, Commercial and Industrial Consumers. They, in turn, can invite other Consumers and Installers, contributing to the development of the community.

To generate an invitation, the Energy Community/Manager must click on the button “Send a new invitation” in section A and specify the type of participant he/she is inviting and some additional information such as email and name. An automatic email will be sent to the participant to register.

If the participant has not registered within a few days, the Manager can send the invitation again as a reminder.

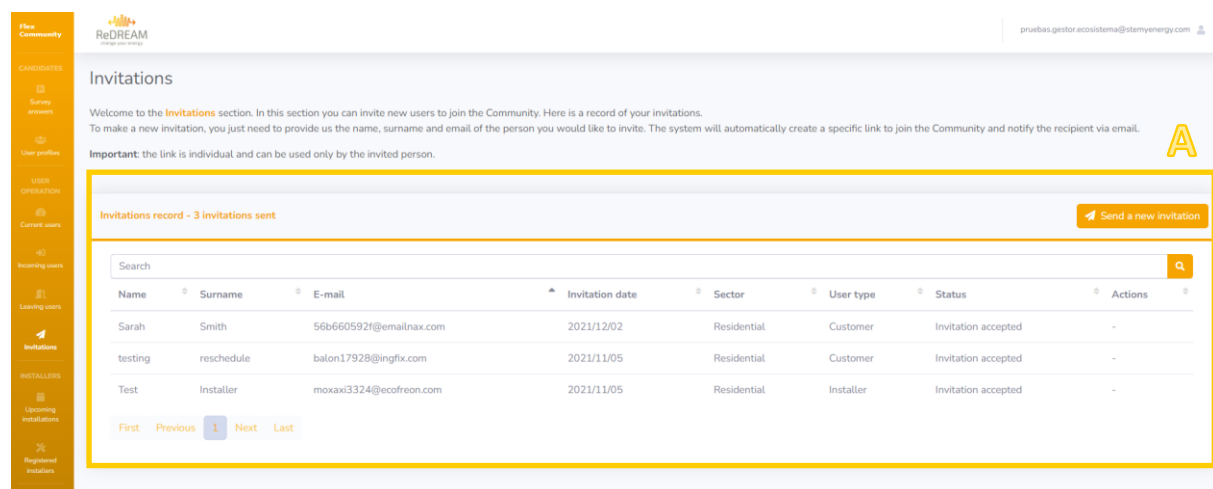


Figure 16 Manager: Invitations



3.2.7 Upcoming installations

This section includes a calendar with details of all scheduled installation appointments.

From here, Stemy and the Energy Community/Manager can see all pending installations at a glance, ensuring that the technical team is informed of the time and day of the installation so that any unforeseen issues that may arise can be solved beforehand.

In addition, the Energy Community/Manager can filter the calendar view by month, week or day, as well as view the installations in list form.

By clicking on any appointment, the Energy Community/Manager can find more details related to that specific visit, e.g. name of the Consumer, phone number, address, etc. Figure 17 shows an example of an installation appointment:

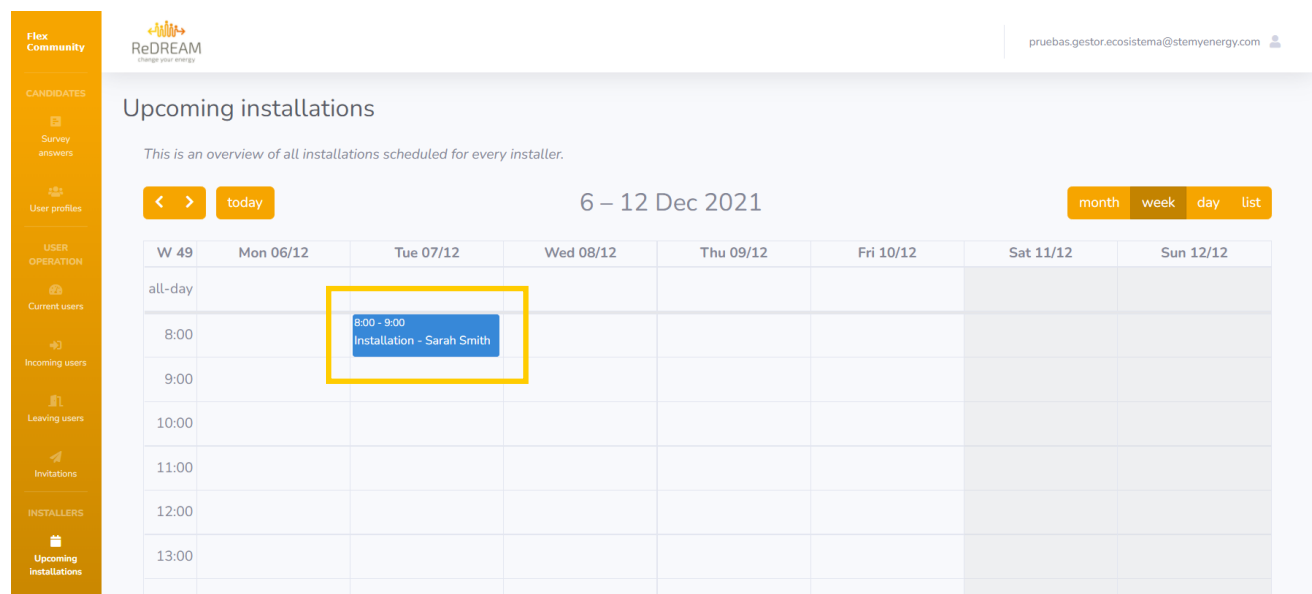


Figure 17 Manager: Upcoming Installations to be developed

3.2.8 Registered Installers

The Energy Community/Manager has access to all information related to Installers.

On the one hand, it provides access to the Installers' calendar, available products to be installed, etc., which helps the Energy Community/Manager assign Installers to each Consumer. On the other hand, each Installer profile includes their contact details in case there needs to be direct communication between the Manager and the installer.

Two sections are distinguishable on figure 18:

- Section A provides a **general list** of all the registered Installers in the portal.
- If the Manager wants to access more **detailed information**, section B provides additional data:
 - Installer Profile information.
 - Installer calendar (upcoming installations or visits).
 - Approved products that the installer can install.

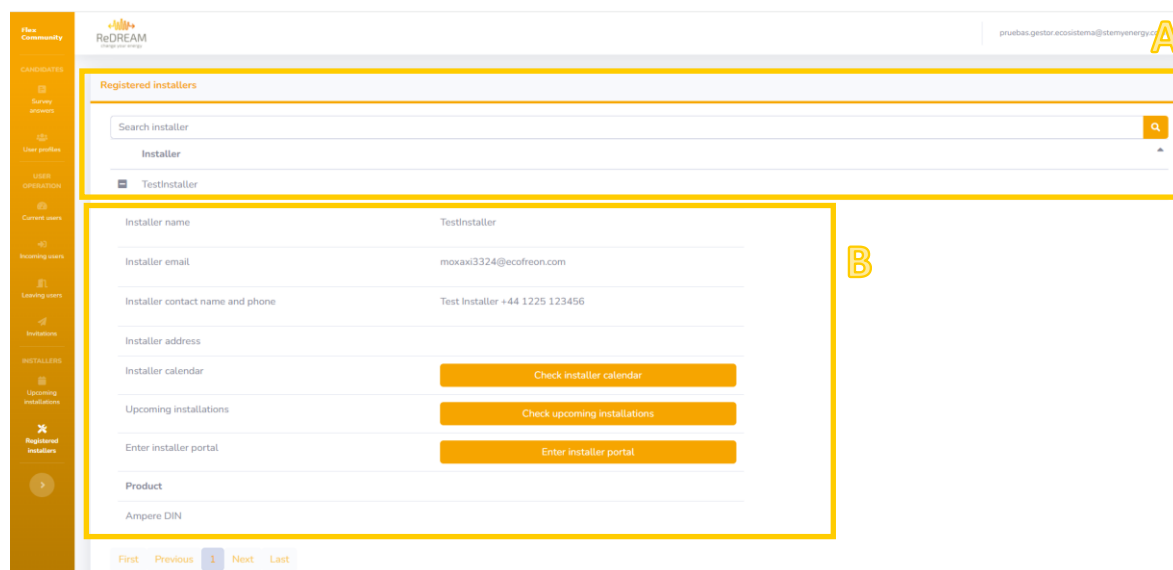


Figure 18 Manager: Registered Installers to be developed

3.2.9 Dashboard of KPIs

This panel will give the Energy Community and/or Manager an overlook of the Key Performance Indicators (KPIs) of their Consumers (Figure 19).

Data displayed includes energy bills, savings and flexibility income, among other indicators, which can be filtered by day, week, month or year. This information can be consulted for a specific individual or each energy resource, e.g. hot water, electric vehicle charging post, etc.

Managers can personalise their experience by creating groups to see the aggregate KPIs for a specific set of Consumers and choosing to view the data in monetary or energy units.

The purpose of this dashboard is to enable the Energy Community/Manager to know and analyse the performance of individual Consumers, groups, or all Consumers in real-time at both financial and electric levels.

This section can be divided into two areas:

- Section A allows the Manager to filter information by day, week, month and year, and also by type of information, financial or energy.
- Section B shows different graphics and tables to represent the gathered data.



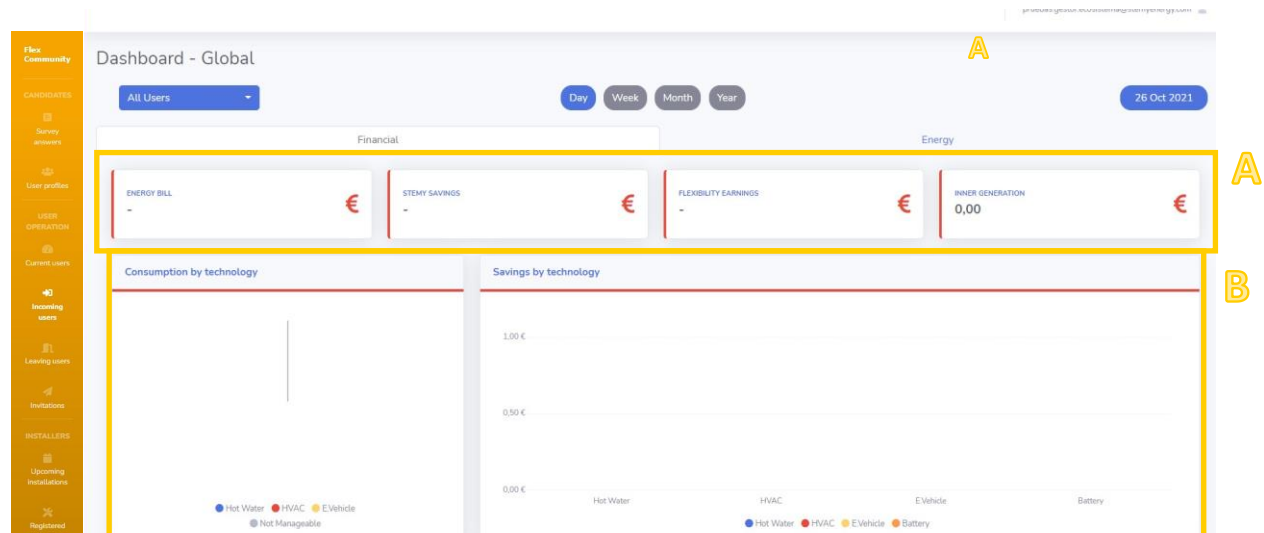


Figure 19 Manager: Dashboard of KPIs

3.3 Installer Portal

Installers have access to their portal, which is different from the one for the Energy Community/Manager and the Consumer Portal. Through it, they can have an overview of the status of all their Consumers and manage all their installations.

It is structured in different sections, which are accessed through the side navigation bar as described in figure 20.

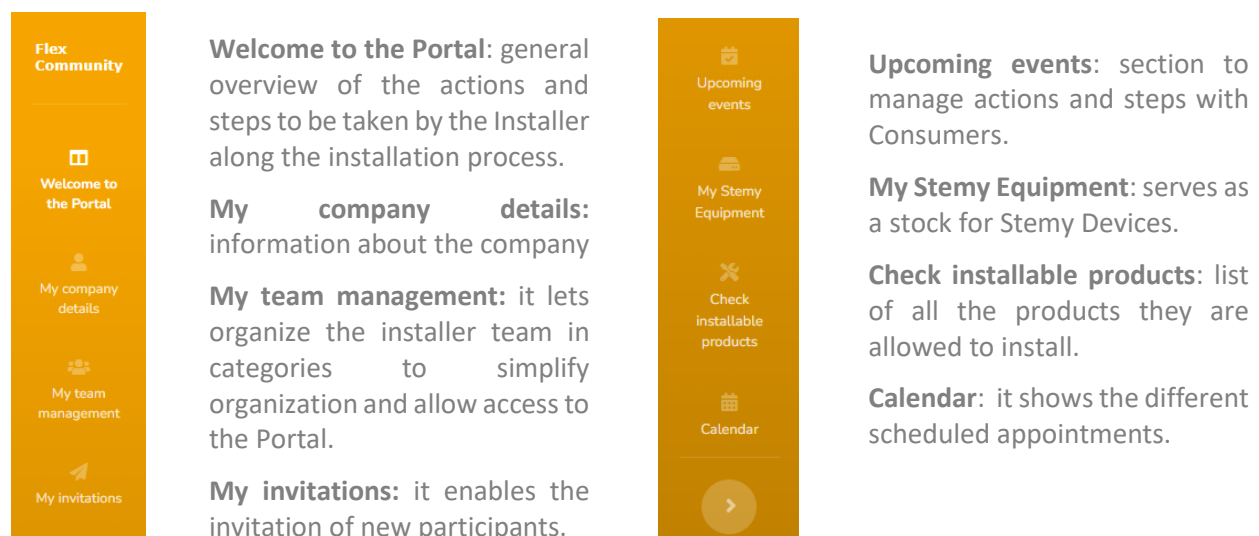


Figure 20 Installer: List of interfaces

3.3.1 Welcome to the portal

The **Welcome** page is the first screen that is displayed to installers when they log in.

Its purpose is to give Installers an overview of the process they will go through with every consumer, from their registration to the final installation of Stemy equipment. Everything the installer needs to know about the steps to complete an installation is on this page, which they can refer to whenever they need it.

The screen in figure 21 is divided into two sections:

- Section A presents a general and brief overview of the different steps and actions that the installer would need to perform to complete an installation.
- Section B provides some tips to navigate through the portal and contact details for Installers to solve any questions that may arise.

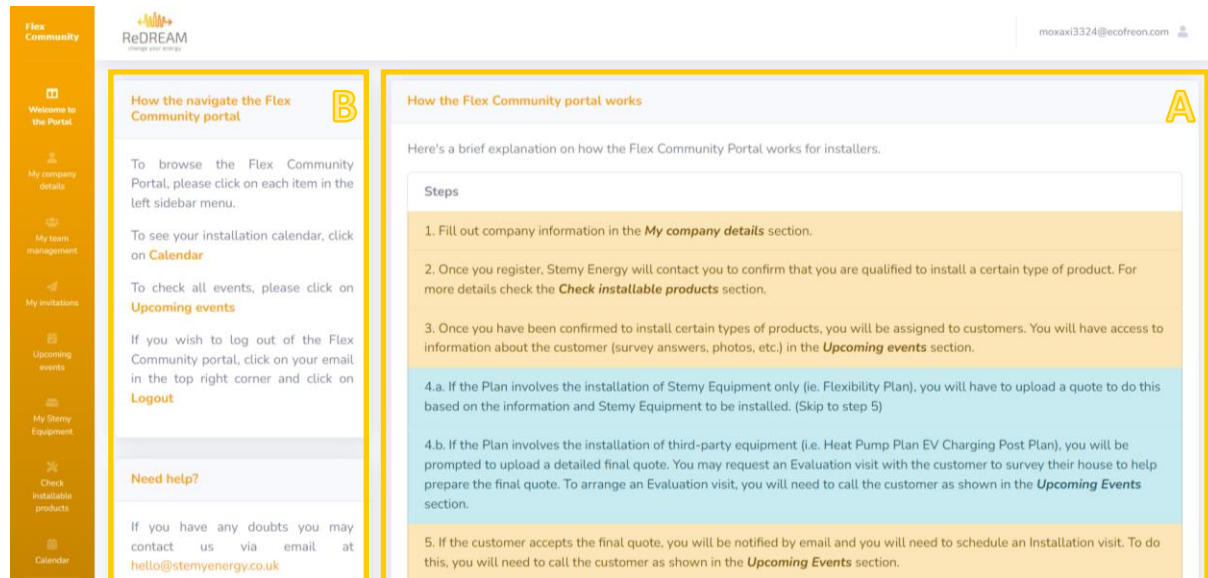


Figure 21 Installer: Welcome to the Portal

3.3.2 My company details

In this section, Installers will be asked to provide basic information about their company, such as address and postcode, and other professional specifications, for instance, their license number.

This data will be used for communication purposes and to verify that the installer is qualified to install low tension equipment.

As shown in figure22, this section includes a map so that the installer can provide their address, making the registration process easier and more interactive:

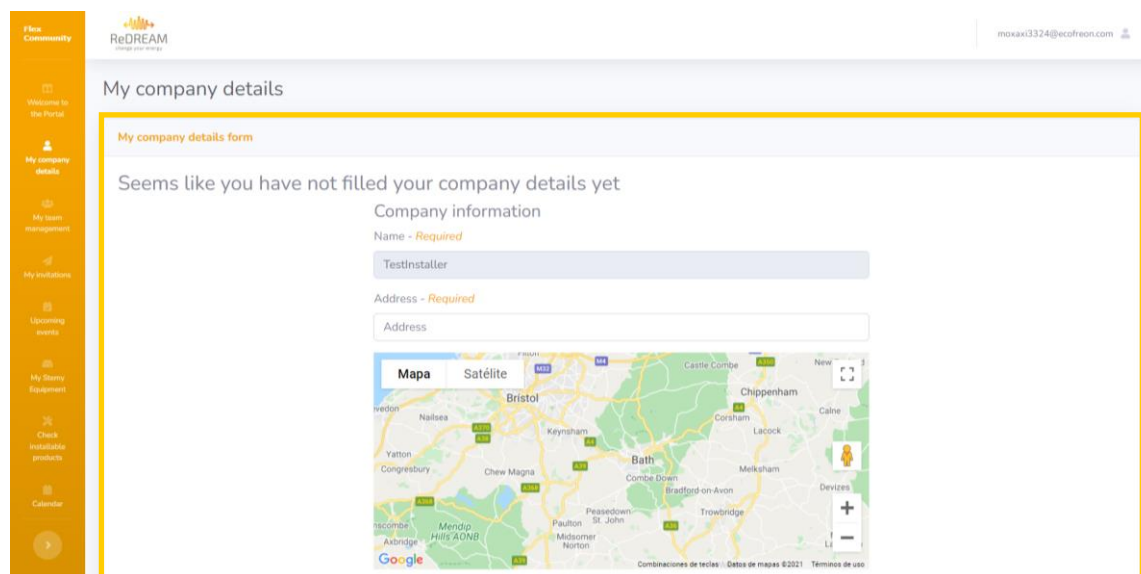


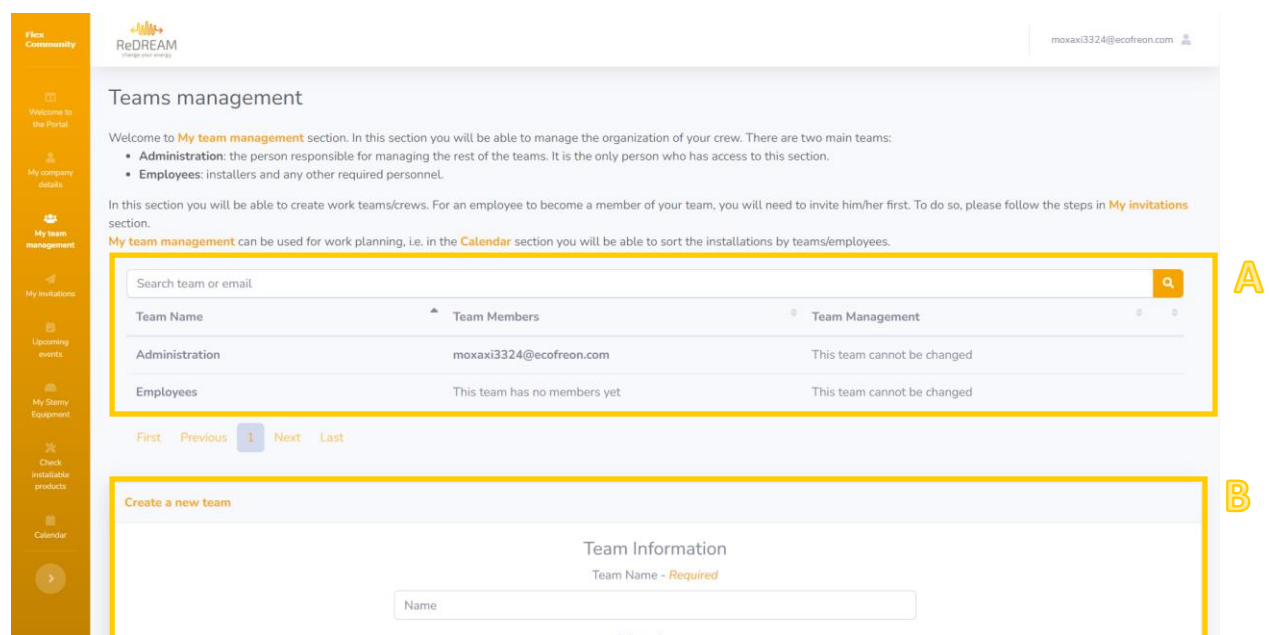
Figure 22 Installer: My company details

3.3.3 My team management

As a result of the presence of large companies of Installers, the need to create this section arose. In it, these companies can create teams of professionals who are responsible for a specific task (e.g., certain people are in charge of making quotes and others of installing equipment), making it easier to manage teams within the organisation.

Figure 23, **My team management** page is composed of two sections:

- Section A will show Installers a list of all the people in their team by category.
- Section B will help Installers organise their team in the different categories they want to create. Please bear in mind, only the “Administration Installer” will be able to manage this section.



The screenshot shows the 'My team management' page. On the left is a sidebar with navigation links. The main content area is titled 'Teams management' and includes a welcome message and instructions. A table lists the current teams, and a section below allows creating a new team. Annotations 'A' and 'B' highlight specific areas.

Team Name	Team Members	Team Management
Administration	moxaxi3324@ecofreon.com	This team cannot be changed
Employees	This team has no members yet	This team cannot be changed

Below the table is a 'Create a new team' section with a 'Team Information' form. The form has a 'Name' field and a 'Team Name - Required' label.

Figure 23 Installer: My team management

3.3.4 My invitations

My invitations section is also available for Installers (Figure 24). This is because they have access to a wide network of Consumers, who might be interested in joining the community, and sometimes organise their work through different teams, as explained in the previous section.

Therefore, this page allows the installer to invite Installer-users and new Residential, Commercial and Industrial Consumers. to join the Flex Community. The installer must click in button “A” to generate an invitation. Then, they need to specify the type of participant (Consumer or Installer-user) they are inviting and some additional information such as email and name.

An automatic email will be generated for the participant to register. If the participant is not registered within a few days, the installer can send the invitation again as a reminder. Once the invitation has been sent, Installers will find a list of all the sent invitations on this page.

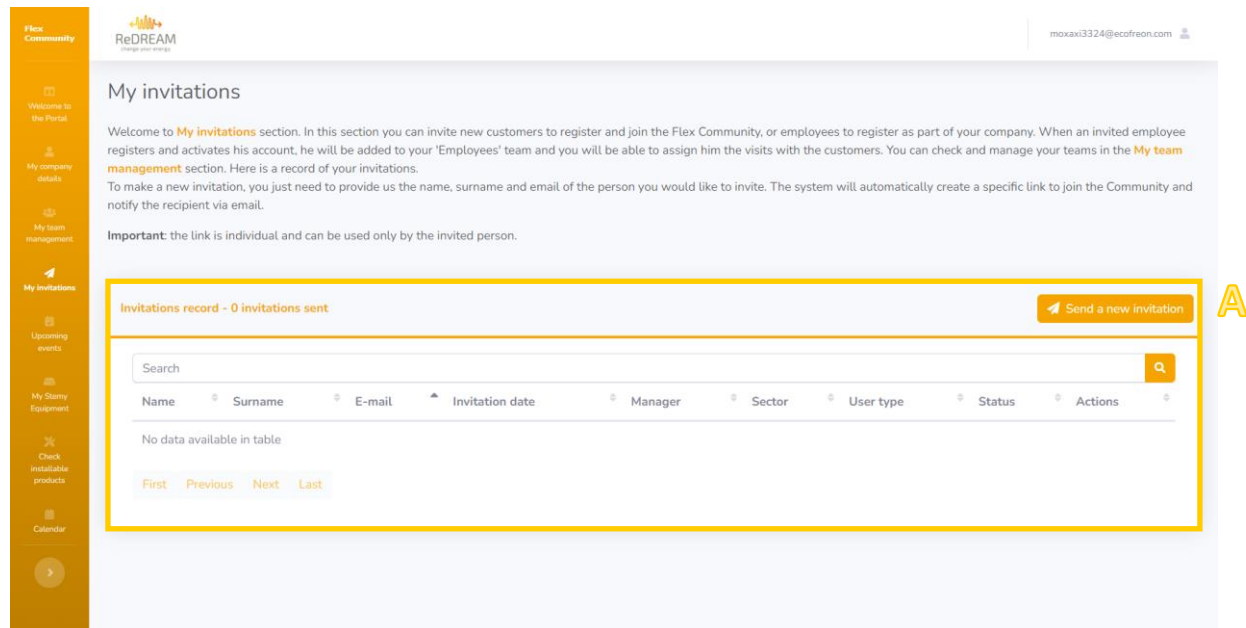


Figure 24 Installer: My invitations

3.3.5 Upcoming events

The **Upcoming events** section is the main section Installers will use to manage installations.

Firstly, it provides an overview of the status of all Consumers within the installation process, e.g., Installation visit closed, Action needed, Schedule Evaluation visit or upload final quote, etc.

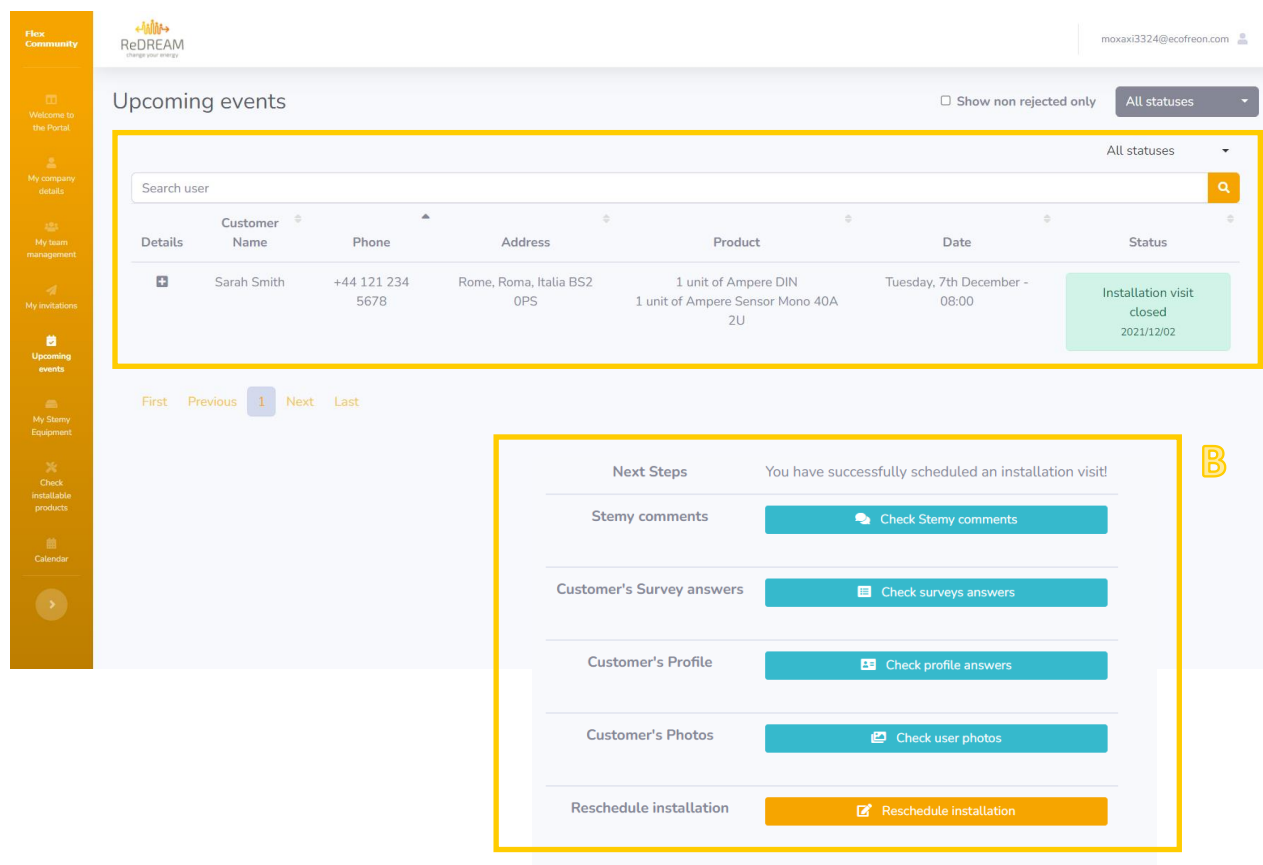
Secondly, it contains access to relevant information about the Consumer's premises and useful general energy information that helps the installer to generate a quotation without the need to visit the installation site, helping anticipate how the installation will look like.

Additionally, this section allows managing the scheduling of visits, providing Installers with the contact details of each Consumer.

The **Upcoming events** page is shown in figure 25.

It can be divided into two areas:

- Section A: The general overview of each Consumer and their Consumer Status (shown in yellow).
- Section B: By clicking on the '+' button, the installer will access a subsection that will help them manage the installation for each Consumer. This subsection contains the following buttons:
 - Check Stemy Comment.
 - Check Survey Answers.
 - Check Profile Answers.
 - Check Consumer Photos.
 - Button which normally appears in dark blue and allows Installers to do the next action to be taken (schedule installation, upload a quote, etc.).



The screenshot displays the ReDREAM installer interface. On the left is a vertical sidebar with navigation options: Home, Community, Welcome to the Portal, My company details, My team management, My invitations, Upcoming events (highlighted), My Stemy Equipment, Check installable products, and Calendar. The main content area is titled 'Upcoming events' and includes a search bar, a table of events, and a 'Next Steps' panel.

Upcoming events table:

Details	Customer Name	Phone	Address	Product	Date	Status
	Sarah Smith	+44 121 234 5678	Rome, Roma, Italia BS2 OPS	1 unit of Ampere DIN 1 unit of Ampere Sensor Mono 40A 2U	Tuesday, 7th December - 08:00	Installation visit closed 2021/12/02

Next Steps panel:

You have successfully scheduled an installation visit!

- Stemy comments: [Check Stemy comments](#)
- Customer's Survey answers: [Check surveys answers](#)
- Customer's Profile: [Check profile answers](#)
- Customer's Photos: [Check user photos](#)
- Reschedule installation: [Reschedule installation](#)

Figure 25 Installer: Upcoming events to be developed

3.3.6 My Stemy Equipment

My Stemy Equipment section is used by Installers to register and manage Stemy Equipment stock (Figure26).

This is very important for Stemy to keep a detailed track of all Stemy Equipment. This system of equipment registration ensures that Stemy has full access to location information and identification codes to know exactly which device is installed to each Consumer.

These are the steps to follow to register Stemy Equipment:

- Once the installer receives Stemy Equipment, they must add the new devices to the inventory by clicking on the button 'A', shown in the figure below. Then they must insert the serial number and control code, which are found on a sticker on each device.
- Section B will show a list of all the Stemy Equipment previously registered.

Within section 4 of this document, under 4.3 Installer's journey, it will be explained that, after registering the devices, the installer must activate the Stemy Equipment before the installation takes place so that it can be used.

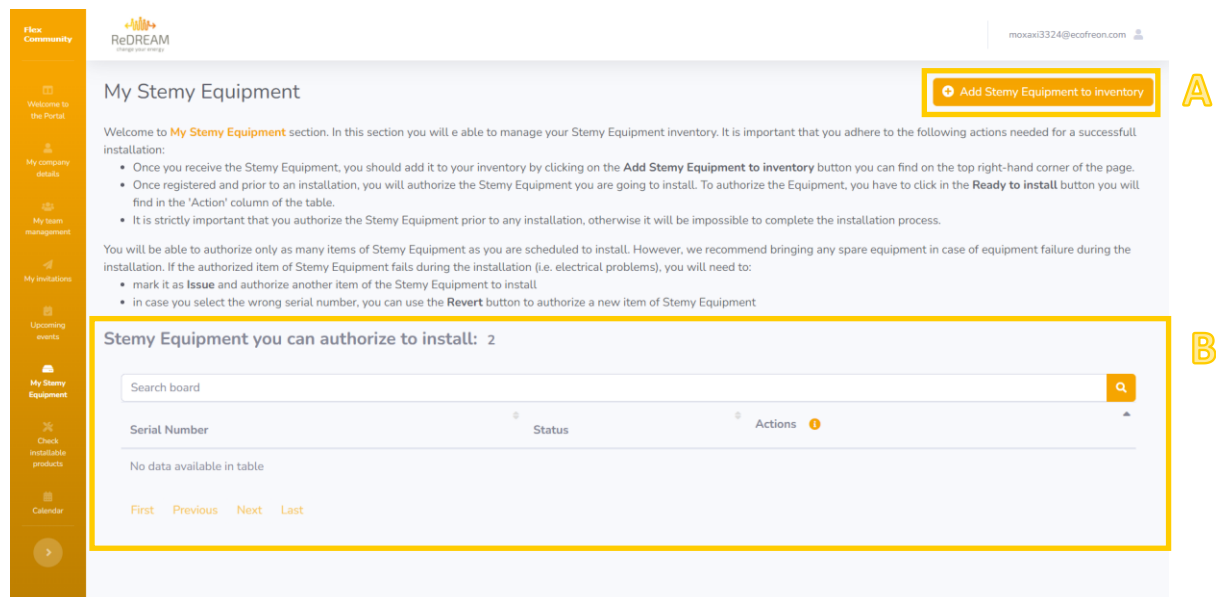


Figure 26 Installer: My Stemy Equipment to be developed

3.3.7 Check installable products

The **Check installable products** section provides Installers with a complete list of products they are authorised and qualified to install.

Additionally, each product has an installation manual Installers can access and download by clicking on the buttons of the section A as shown in figure 27.

These manuals contain technical information, such as the characteristics of each product, and a detailed explanation of how to install them, which is very valuable for Installers.

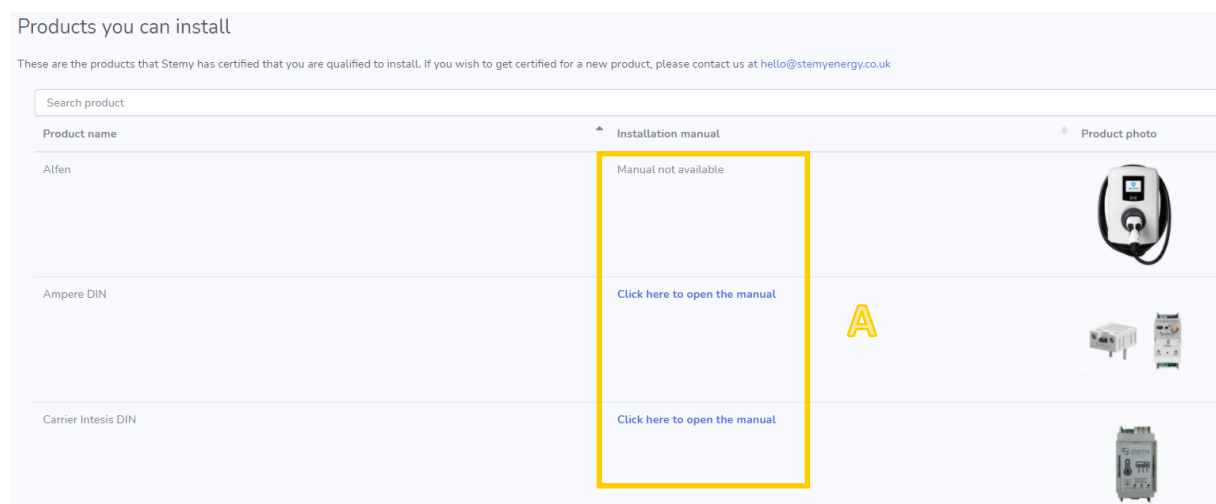


Figure 27 Installer: Check installable products to be developed

3.3.8 Calendar

The **Calendar** section provides Installers with an overview of all visits scheduled with each Consumer (Figure 28, section A).

By clicking on section B, the installer will find a detailed explanation of the characteristics of each visit.



Installers can filter the information to display it as they wish by day, week and month, or in a list. They can also view the global calendar or a specific calendar for a member of their team (Section C).

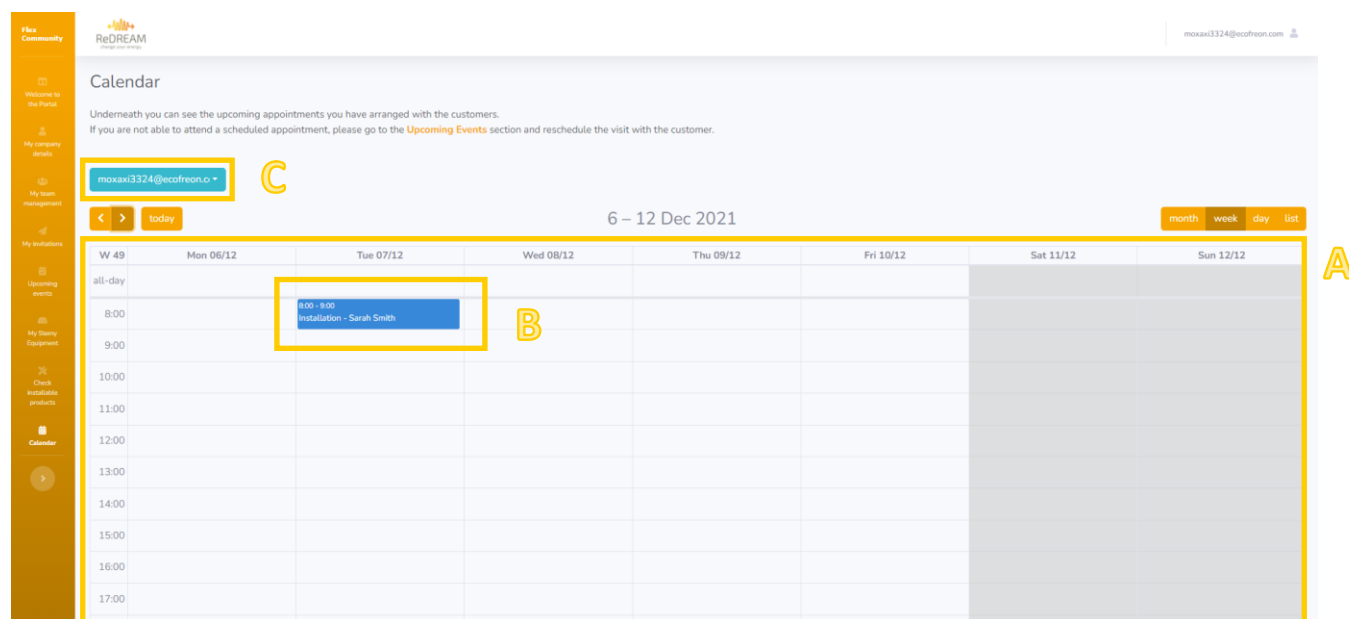


Figure 28 Installer: Calendar to be developed

4 Journey of the main agents in the REDREAM Ecosystem

This section will explain which are the main agents that can use the Ecosystem, their role and complete journey to be able to define the interaction between them.

As it is shown in the legend, four agents are interacting in the Ecosystem: Stemy (as Aggregator), the Energy Community or Manager (DEMO leader), the Consumer, and the Installer. The installation process can be summarised in 12 steps as shown in Figure 29.

THE ECOSYSTEM JOURNEY



Figure 29 Global Ecosystem Journey

- **STEP 1:** The Manager invites a new Consumer.
- **STEP 2:** The Consumer registers in the portal.
- **STEP 3:** The Consumer fills in the information required to complete their Profile.
- **STEP 4:** The Consumer requests a Plan by completing its specific survey.
- **STEP 5:** Stemy Energy assesses the Consumer suitability to join the Plan.
- **STEP 6:** Stemy Energy approves the Consumer to join the Plan.
- **STEP 7:** The Consumer signs the Terms & Conditions on the portal to continue with the process.
- **STEP 8:** Stemy Energy creates a personalised solution for the Consumer and assigns Installers.
- **STEP 9:** The Installer uploads the quote for the installation.
- **STEP 10:** The Manager chooses a quote.



- **STEP 11:** The Installer agrees on an installation date with the Consumer and registers it in the portal.
- **STEP 12:** The installation takes place, and the process is finished.

4.1 Consumer's journey

In this section, Consumers will learn more about the Consumer's Journey within the portal. Each step required to complete an installation is shown in Figure 30.



Figure 30 Consumer Journey

- **STEP 1:** Register in the Portal.
- **STEP 2:** Fill in the information required to complete their Profile.
- **STEP 3:** Allow access to data from their meter.
- **STEP 4:** Request a Plan by completing its specific survey.
- **STEP 5:** Sign the Terms & Conditions on the portal to continue with the process.
- **STEP 6:** Schedule the installation visit.

4.1.1 Sign up

Registering in the Flex Community or the Sign-up process is made of 3 easy steps:

1. The Consumers will receive by email a **notification to register in the portal**.
2. They must complete the requested information.
3. They will receive an email to **activate their account**.

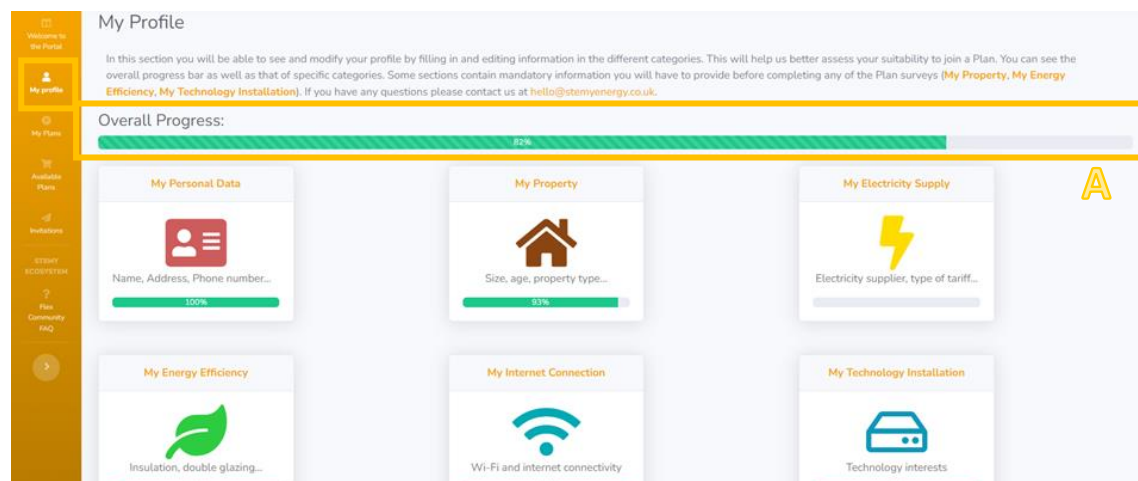
Once all these steps are completed, the Consumer is all ready to go! Please, always check the SPAM folder.

4.1.2 Complete your Profile

Section 3.1.2 is formed of different informative categories that are required to be filled before applying for a Plan, such as connectivity of their home, personal information, energy supply, etc.

This section is quite helpful for Installers and Managers to determine the best solution to the Consumer's needs. In figure 31:

- Overall Progress (A): this bar will change colour and progress as the Consumer fills in each section of the Profile.
- By clicking on each section, the Consumer can answer the necessary questions.



My Profile

In this section you will be able to see and modify your profile by filling in and editing information in the different categories. This will help us better assess your suitability to join a Plan. You can see the overall progress bar as well as that of specific categories. Some sections contain mandatory information you will have to provide before completing any of the Plan surveys (**My Property**, **My Energy Efficiency**, **My Technology Installation**). If you have any questions please contact us at hello@stemenergy.co.uk.

Overall Progress: 82%

My Personal Data
Name, Address, Phone number... 100%

My Property
Size, age, property type... 93%

My Electricity Supply
Electricity supplier, type of tariff...

My Energy Efficiency
Insulation, double glazing...

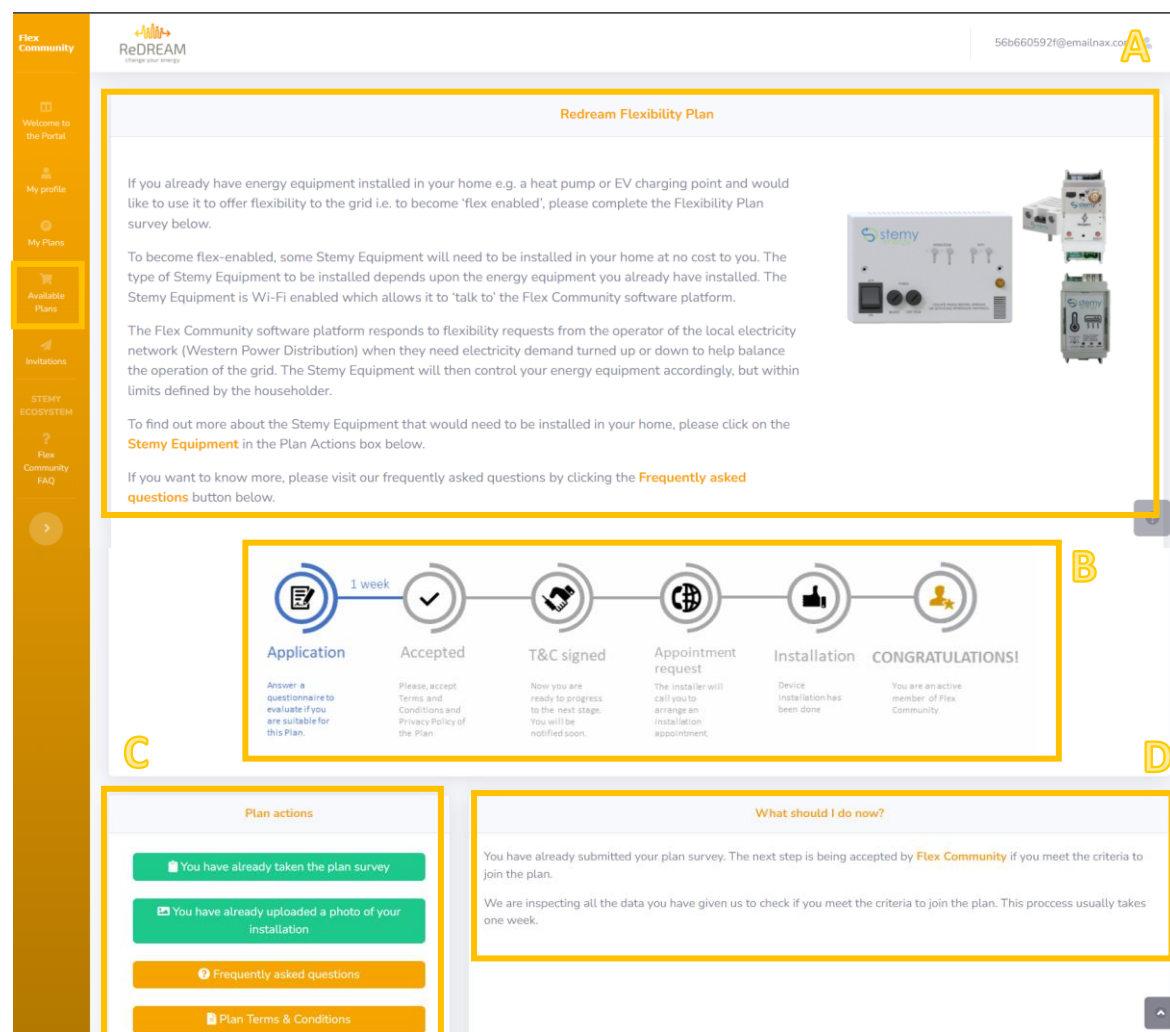
My Internet Connection
Wi-Fi and internet connectivity

My Technology Installation
Technology interests

Figure 31 Consumer Journey: Complete your Profile

4.1.3 Request a Plan

The Consumer can navigate through the Available Plans section and join any Plan of their interest (figure 32). To become a member of the Plan and assess the Consumer's suitability, they will have to **complete the Survey Plan**.



Redream Flexibility Plan

If you already have energy equipment installed in your home e.g. a heat pump or EV charging point and would like to use it to offer flexibility to the grid i.e. to become 'flex enabled', please complete the Flexibility Plan survey below.

To become flex-enabled, some Stemy Equipment will need to be installed in your home at no cost to you. The type of Stemy Equipment to be installed depends upon the energy equipment you already have installed. The Stemy Equipment is Wi-Fi enabled which allows it to 'talk to' the Flex Community software platform.

The Flex Community software platform responds to flexibility requests from the operator of the local electricity network (Western Power Distribution) when they need electricity demand turned up or down to help balance the operation of the grid. The Stemy Equipment will then control your energy equipment accordingly, but within limits defined by the household.

To find out more about the Stemy Equipment that would need to be installed in your home, please click on the **Stemy Equipment** in the Plan Actions box below.

If you want to know more, please visit our frequently asked questions by clicking the **Frequently asked questions** button below.

Timeline:

- Application** (1 week): Answer a questionnaire to evaluate if you are suitable for this Plan.
- Accepted**: Please, accept Terms and Conditions and Privacy Policy of the Plan.
- T&C signed**: Now you are ready to progress to the next stage. You will be notified soon.
- Appointment request**: The installer will call you to arrange an installation appointment.
- Installation**: Device installation has been done.
- CONGRATULATIONS!**: You are an active member of Flex Community.

Plan actions:

- You have already taken the plan survey
- You have already uploaded a photo of your installation
- Frequently asked questions
- Plan Terms & Conditions

What should I do now?

You have already submitted your plan survey. The next step is being accepted by **Flex Community** if you meet the criteria to join the plan.

We are inspecting all the data you have given us to check if you meet the criteria to join the plan. This process usually takes one week.

Figure 32 Consumer Journey: Request a Plan

The Energy Community/Manager will review the Consumer's answers and come back to them within one week to update them.

- Section A: explains the idea and goal behind the Plan. This means what technologies are included, what achievements will be pursued, the reasons for applying.
- Section B: provides the progress of the installation process and will be coloured as steps are achieved.
- Section C: provides all the buttons the Consumer may need to follow to perform the necessary actions. In this case, it will direct the Consumer to **Plan Survey**.
- Section D: a summary of the action the Consumer has completed and what is their current status.

4.1.4 Sign T&Cs

Once the Consumer has been approved to join a Plan, they will be asked to sign the **Terms and Conditions**. (figure 33)

To access the Terms and Conditions, Consumers must click on the button "A" shown below.

A new window will open (B), and the Consumer could have access to the T&Cs document and its signature button. Consumers can read these here and accept them if they agree.

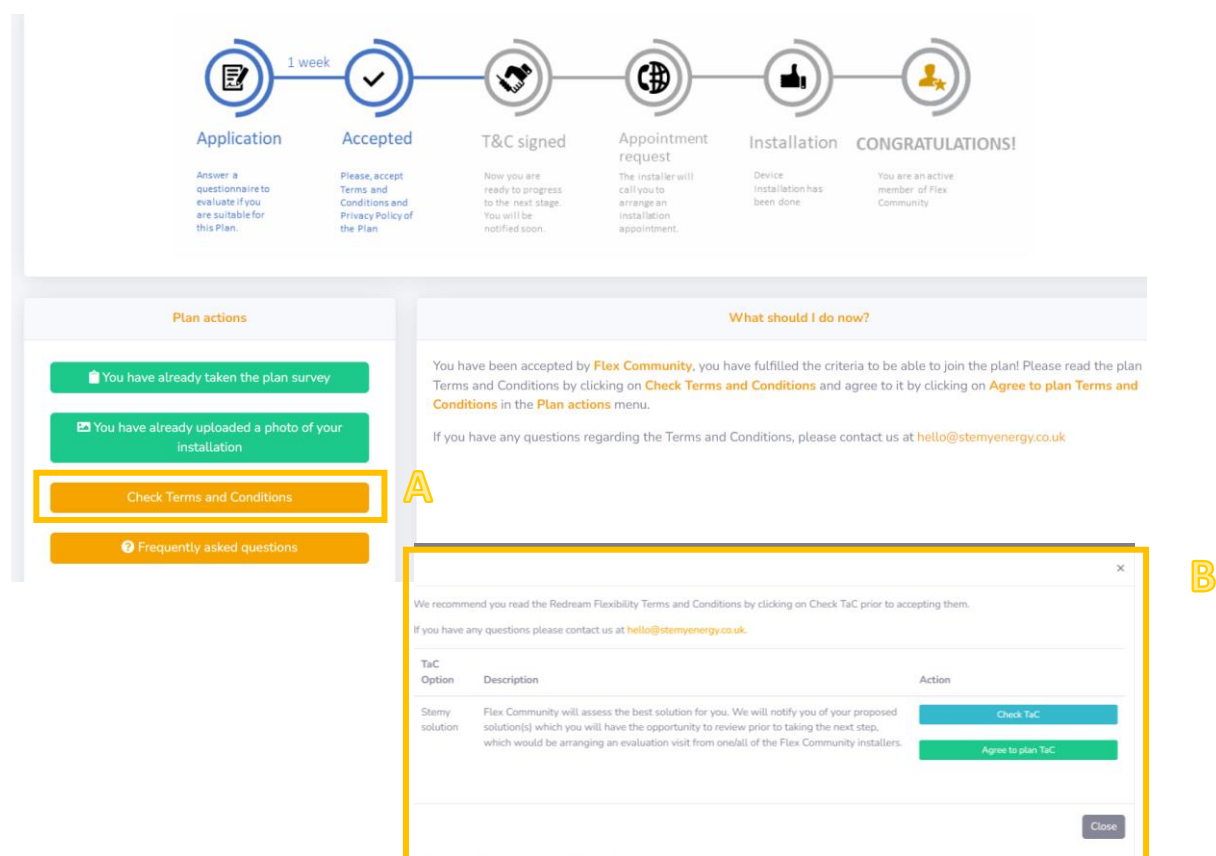


Figure 33 Consumer Journey: Sign T&C

4.1.5 Installation Visit

The installer will call the Consumer to schedule an installation visit at the time and day of their preference.



The “What should I do now?” box below shows the details of the installation visit once it has been scheduled.

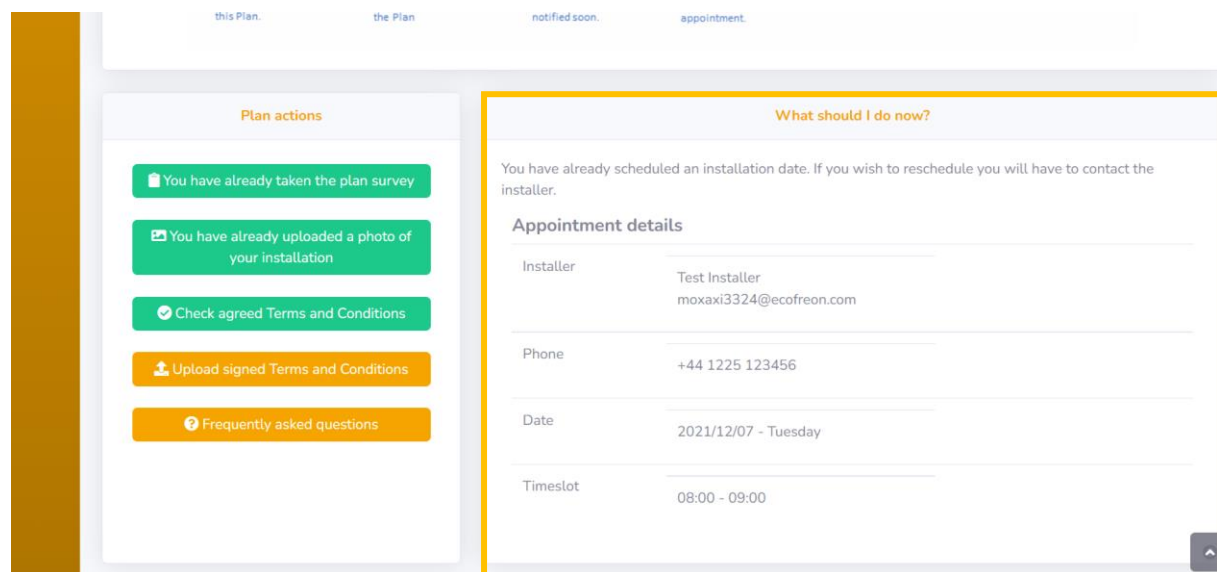


Figure 34 Consumer Journey: Installation Visit

4.2 Energy Community or Manager's journey

In this section, Energy Community or Managers will learn more about the Energy Community and/or Manager Journey within the portal. Each step required to complete an installation is shown in Figure 35.

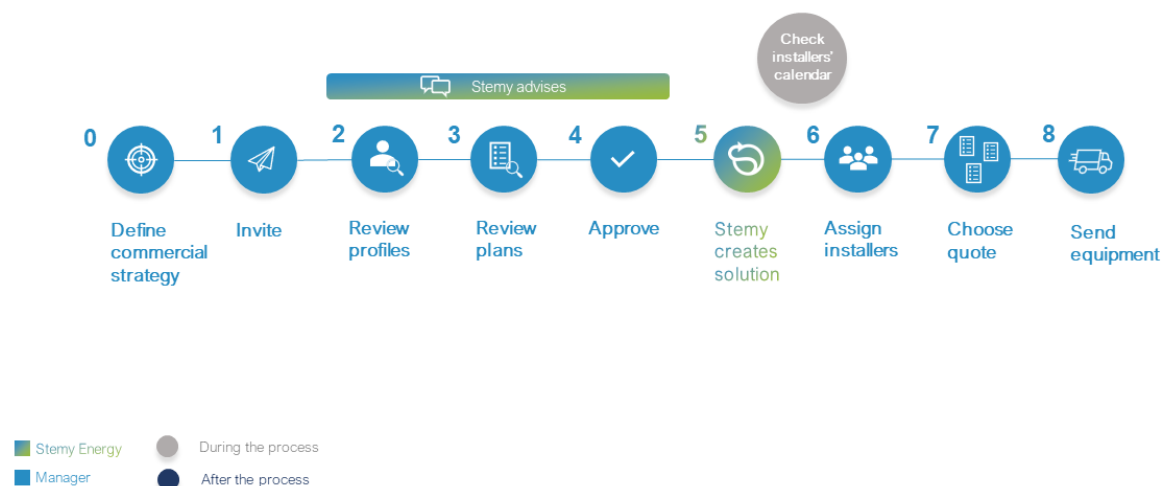


Figure 35 Manager's Journey

- **STEP 0:** Define the commercial strategy.
- **STEP 1:** Invite Consumers and Installers to join the portal.
- **STEP 2:** Review new Consumers' profiles.
- **STEP 3:** Review new Consumers' answers to the Plan survey.
- **STEP 4:** Approve Consumers to be members of a Plan.
- **STEP 5:** Stemy creates a personalised solution for the Consumer.



- **STEP 6:** Assign the Installers that will make the installation.
- **STEP 7:** Choose the quote of preference.
- **STEP 8:** Send equipment to the installer.

4.2.1 Sign up

Energy Communities/Managers do not have to follow any “Sign up” process. Instead, they need to provide Stemy Energy with an email account. This account will be used for the portal login and to receive, manage, and follow up all communications.

We strongly recommend creating new email accounts exclusively dedicated to the portal:

- flex@companyname.com

On the other hand, **the Energy Community/Manager oversees facilitating the “Sign-up” process** for the rest of the Portal Consumers (Installers and Consumers).

They can do this through the 3.2.6 Invitations section of the Portal (*Step 1-Usual Operation*).

4.2.2 Invitation to Access

Any member of the portal needs prior authorisation or invitation to register in the portal. The Energy Community/Manager can manage these in the 3.2.6 Invitations section. In figure 36, the possible actions are:

1. Send a **new invitation**. (A)
2. Fill in the details and select the **type of Consumer** (Residential Consumer, Commercial Consumer, Installer, etc.). (B)
3. There is a default **email** the Energy Community/Manager can customise if needed.

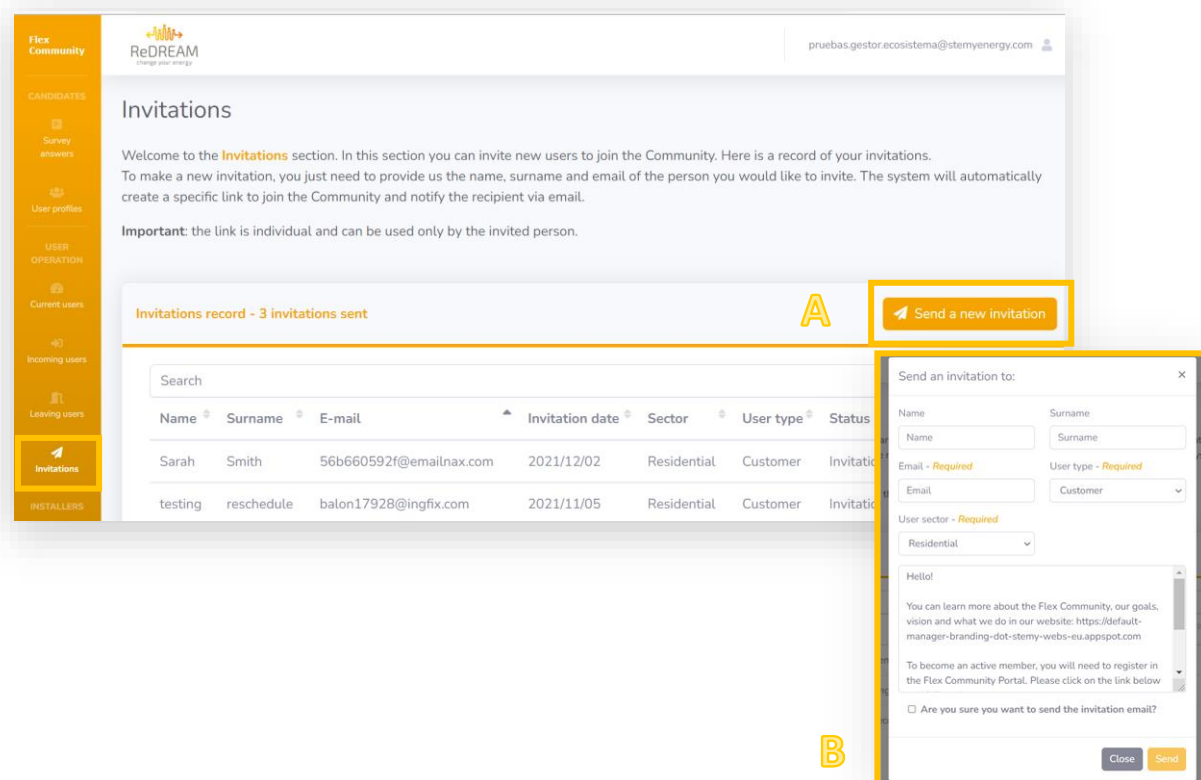


Figure 36 Manager's Journey: Invitation to Access



4.2.3 Suitability Assessment (Steps 2,3 & 4)

The Suitability Assessment involves the following steps (Figure 37):

- The Energy Community/Manager will now proceed to review the Consumer's answers to the **Plan Survey** in the 3.2.1 Survey answers section to evaluate their suitability for each Plan. (A)
- If the Energy Community/Manager needs further information, they will be able to see the Consumer's answers to the 3.1.2 My profile section in the 3.2.2 Consumer-User profile section.
- If, after reviewing all the information, they decide that the Consumer is **suitable**, he/she will be **approved to join Plan** in the blue button shown below (in a maximum of a week). (B)

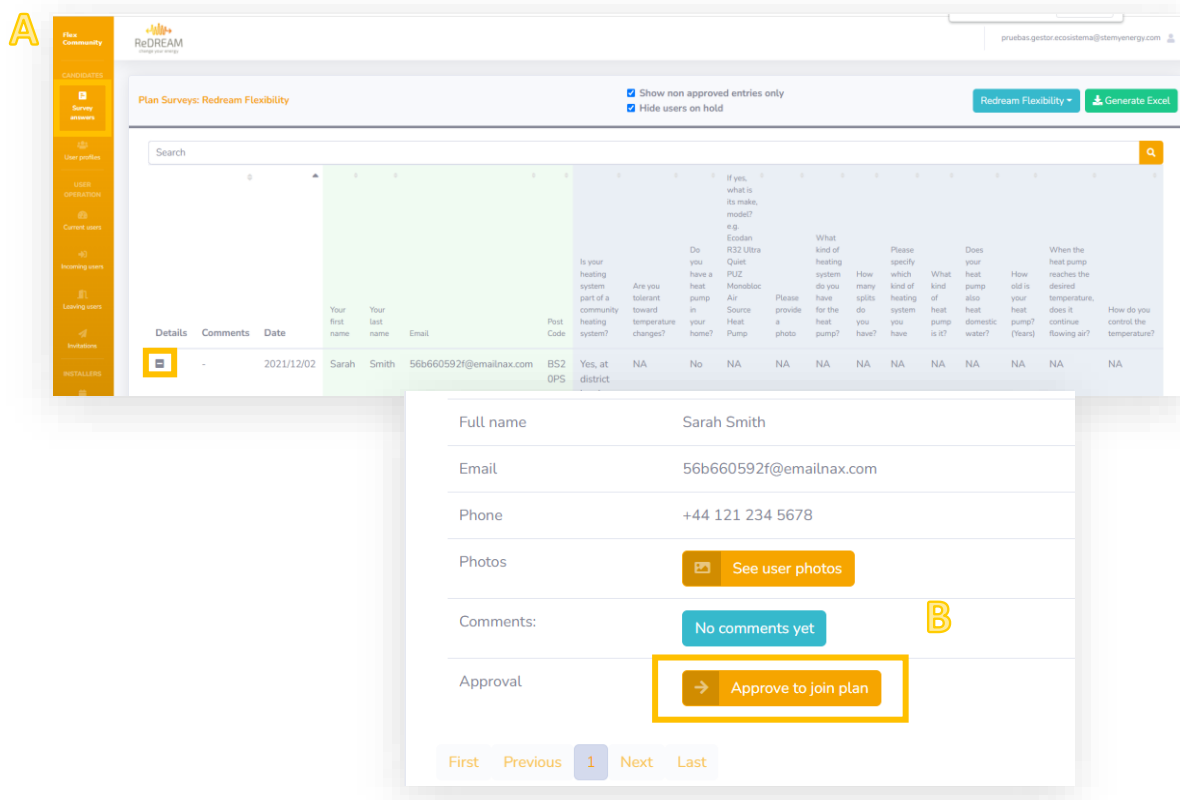


Figure 37 Manager's Journey: Suitability Assessment

4.2.4 Creating a solution

Once a Consumer has signed the Terms & Conditions, Stemy proceeds to create a personalised solution and assigns their Installers.

This solution is tailored to the unique needs of each Consumer, assigning specific devices depending on the characteristics of the Consumer's premises and their energy information.

The Consumer will be notified that Stemy has created a solution for them.

4.2.5 Assigning installers

The Energy Community/Manager assigns Installer/s. Several installers can be assigned to the same solution for the Energy Community/Manager/Stemy to choose the most suitable one.

To assign Installers, the Energy Community/Manager must go to 3.2.4 Incoming and select the desired Consumer. By clicking on 'Solutions' (Figure 38), they will find a button (A) that will allow the selection of the installer they want to assign to the Consumer.

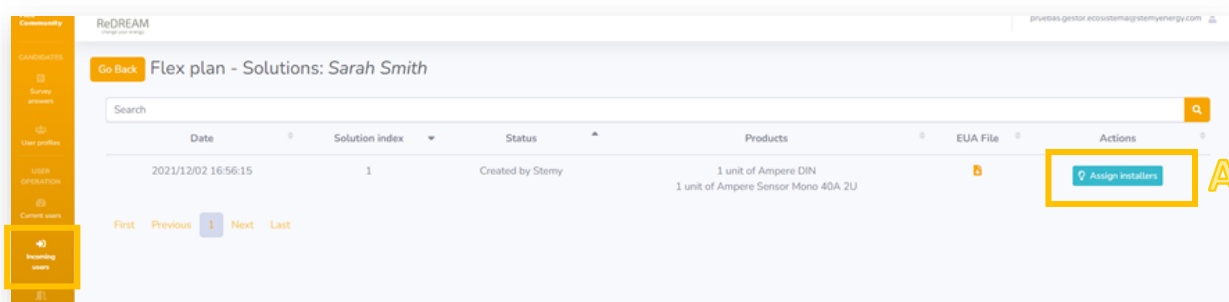


Figure 38 Manager's Journey: Assigning installers

4.2.6 Quote Acceptance

Quotes **will be reviewed and accepted** by the Energy Community/Manager and/or Stemy before they are visible to the Consumer (Figure 39).

If **only one installer** was assigned, the quote would be verified if it is correct and reasonable.

If more than one installer was assigned, the Energy Community/Manager and/or Stemy would choose the quote that will be sent to the Consumer among the different quotes.

To select a quote, they must go to 3.2.4 Incoming and select the desired Consumer. By clicking on 'Go to solutions' in the Actions section, they will find a button (A) that will allow the choice of their preferred quote.

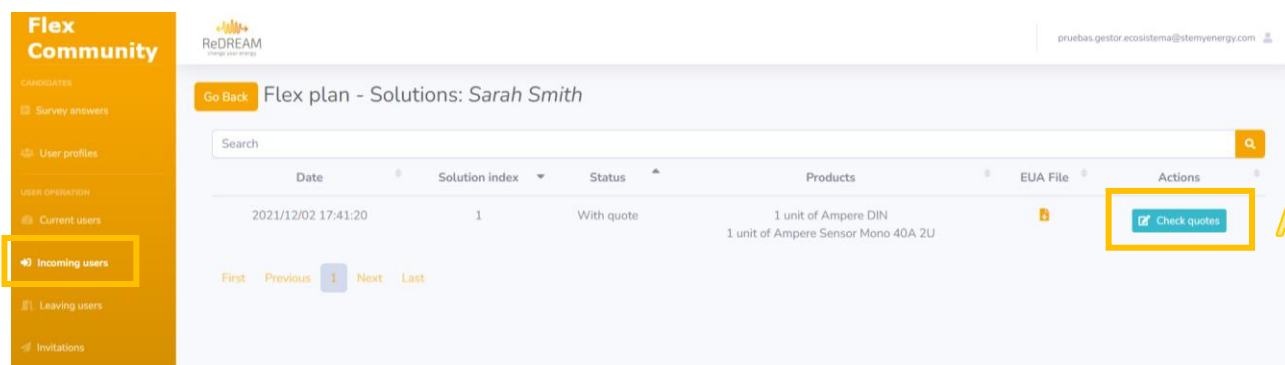


Figure 39 Manager's Journey: Quote Acceptance

4.2.7 Finished Installation

The installer will call the Consumer to schedule an installation visit. Once the installation is finished, the Consumer will move from the Incoming section to the Current section.

4.2.8 After the Process

Once the installation is completed there are several scenarios that may require further action from the Energy Community/Manager.

1. **Extended Plan:** it may be possible that additional devices or technologies are required to be installed.
2. **De-installation:** if the Consumer decides to leave the Plan, the installed Stemy Equipment and Devices should be deinstalled.

3. **Maintenance services:** it may be the case that the installed Equipment requires replacement or maintenance services.

In all these scenarios, the Plan will be re-opened, starting on step 4.2.5 “Assigning installers”, and the same journey as previously described will be followed.

4.3 Installer’s journey

In this section, Installers will learn more about the Installer’s Journey within the portal. Each step required to complete an installation is shown in the figure 40.

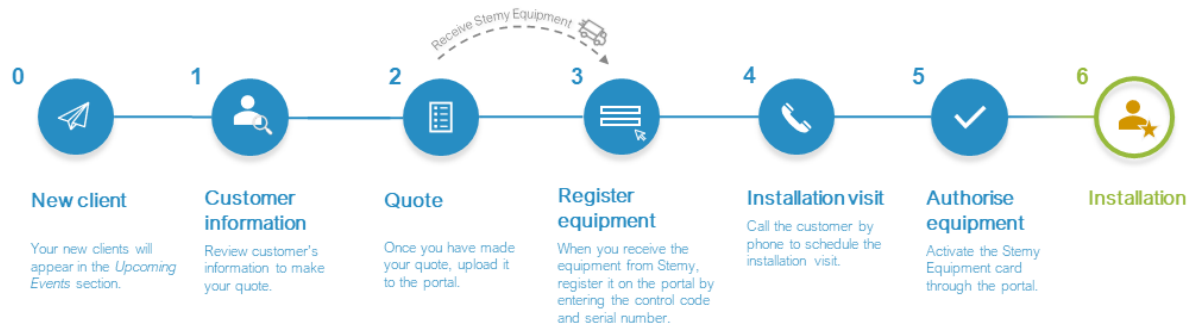


Figure 40 Installer’s Journey

- **STEP 0:** A new Consumer enters the portal.
- **STEP 1:** Review Consumer information to make the quote.
- **STEP 2:** Make the quote and upload it to the portal.
- **STEP 3:** When Installers receive Stery Equipment, they must register it in the portal.
- **STEP 4:** Call the Consumer to schedule an installation visit.
- **STEP 5:** Activate the Stery Equipment through the Portal.
- **STEP 6:** Installation successfully completed.

4.3.1 Sign up

The Sign-up process is made of 3 easy steps:

1. Receive a **notification by email to register in the portal**.
2. Complete the requested information.
3. Receive an email to **activate their account**.

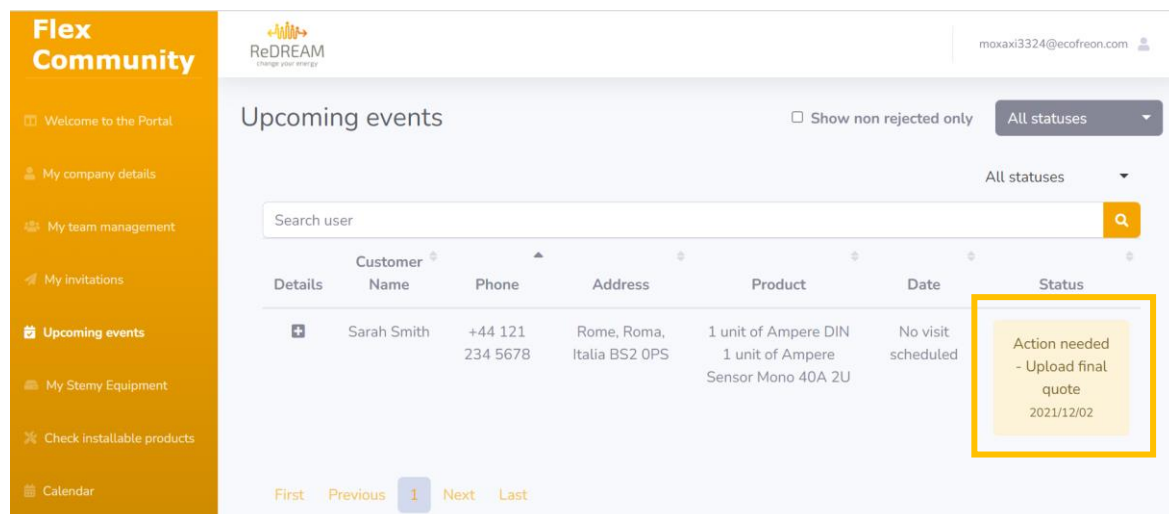
Once all these three steps are completed, the installer is all ready to go! Please, always check the SPAM folder.

The portal also provides the installer with the option to create Teams or invite new Residential, Commercial and Industrial Consumers. For that, they must invite the professionals they would like to include in their team. Installers can do this in section 3.3.4 My invitations. The process of signing up will be the same as the one they previously followed.

4.3.2 New Consumer

Figure 41, once Installers have registered in the Flex Community Portal, they will be able to manage all their installations.

Each time a Consumer is assigned to them, **they will receive an email notification**. In section 3.3.5 Upcoming events, Installers will have an updated list of all their Consumers, including their personal information, the product/s that will be installed and the status of the installation.



The screenshot shows the 'Upcoming events' section of the ReDREAM portal. On the left is a sidebar with navigation options like 'Welcome to the Portal', 'My company details', 'My team management', 'My invitations', 'Upcoming events', 'My Stemy Equipment', 'Check installable products', and 'Calendar'. The main area displays a table of upcoming events. The first event is for Sarah Smith, with details including phone number, address, and products. The status column shows 'Action needed - Upload final quote' with a date of 2021/12/02. A yellow box highlights this status, and a yellow letter 'A' is placed next to it.

Details	Customer Name	Phone	Address	Product	Date	Status
+	Sarah Smith	+44 121 234 5678	Rome, Roma, Italia BS2 OPS	1 unit of Ampere DIN 1 unit of Ampere Sensor Mono 40A 2U	No visit scheduled	Action needed - Upload final quote 2021/12/02

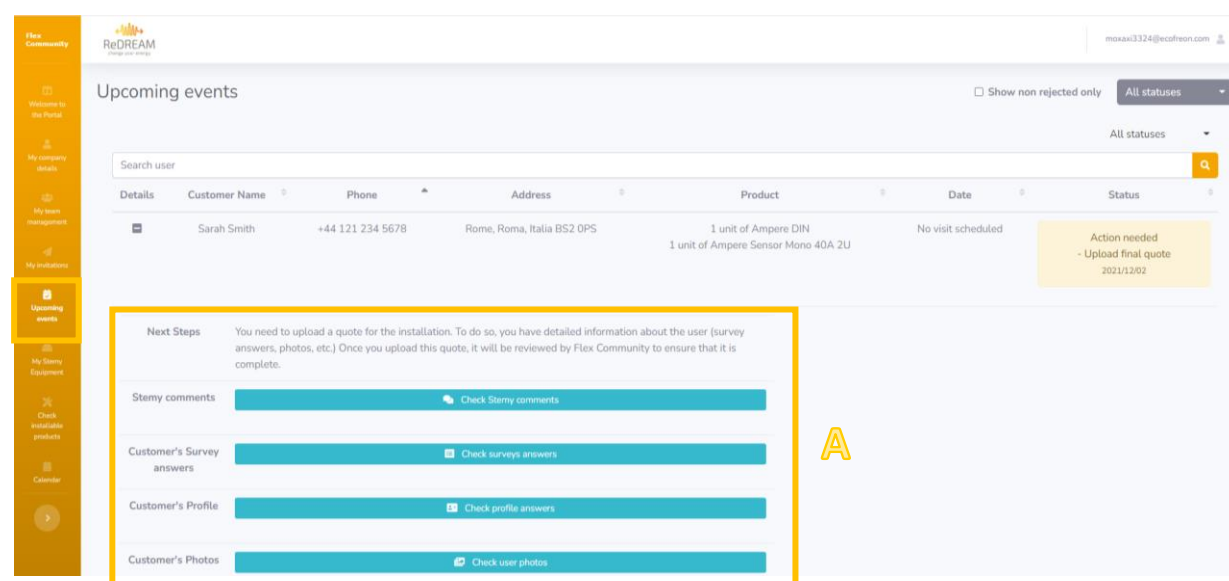
Figure 41 Installer's Journey: New Consumer

The **status** (A) is particularly relevant as it provides an **overview** of the installer's position with each Consumer (actions to be taken) and **will evolve as they progress through the installation steps**.

4.3.3 Consumer Information

Installers can review the 3.2.1 Survey answers and 3.2.2 Consumer-User profile, as well as **photos** and other information related to the Consumer. This information will help them understand the technical requirements of the installation and foresee possible necessities before the installation.

To access this information, they must go to Upcoming Events, search for the Consumer, and click on the '+' button on the left side. Then they will access the different sections providing Consumer information (Survey Answers, Profile, Photos, etc.). (Figure 42, section A)



The screenshot shows the 'Upcoming events' section of the ReDREAM portal. The table from Figure 41 is visible at the top. Below the table, there is a 'Next Steps' section with a list of tasks to be completed. A yellow box highlights this section, and a yellow letter 'A' is placed next to it.

Details	Customer Name	Phone	Address	Product	Date	Status
+	Sarah Smith	+44 121 234 5678	Rome, Roma, Italia BS2 OPS	1 unit of Ampere DIN 1 unit of Ampere Sensor Mono 40A 2U	No visit scheduled	Action needed - Upload final quote 2021/12/02

Next Steps

You need to upload a quote for the installation. To do so, you have detailed information about the user (survey answers, photos, etc.) Once you upload this quote, it will be reviewed by Flex Community to ensure that it is complete.

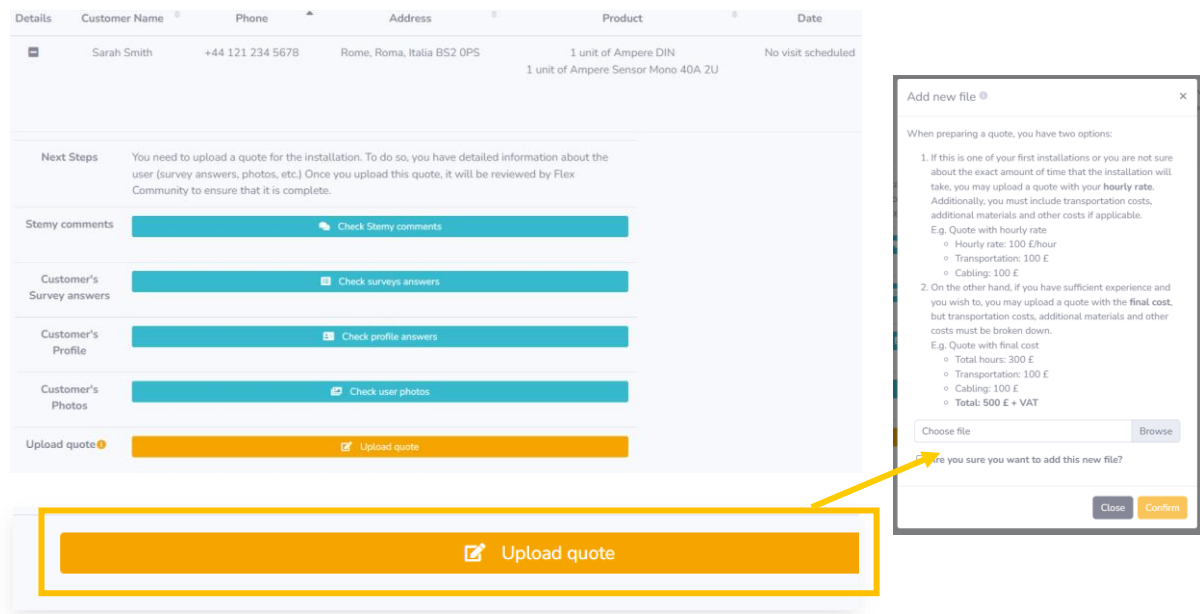
- Stemy comments: Check Stemy comments
- Customer's Survey answers: Check surveys answers
- Customer's Profile: Check profile answers
- Customer's Photos: Check user photos

Figure 42 Installer's Journey: Consumer Information

4.3.4 Quote

Once the installer has reviewed the necessary information, they can prepare **the quotation**. They can also be asked to prepare quotes for maintenance purposes.

To access this information, they must go to 3.3.5 Upcoming events, search for the Consumer and click on the '+' button on the left side. Then, they will find a button that will allow them to upload their quote for approval (Figure 43).



Details	Customer Name	Phone	Address	Product	Date
	Sarah Smith	+44 121 234 5678	Rome, Roma, Italia BS2 0PS	1 unit of Ampere DIN 1 unit of Ampere Sensor Mono 40A 2U	No visit scheduled

Next Steps

You need to upload a quote for the installation. To do so, you have detailed information about the user (survey answers, photos, etc.) Once you upload this quote, it will be reviewed by Flex Community to ensure that it is complete.

Stemy comments [Check Stemy comments](#)

Customer's Survey answers [Check surveys answers](#)

Customer's Profile [Check profile answers](#)

Customer's Photos [Check user photos](#)

Upload quote [Upload quote](#)

Add new file

When preparing a quote, you have two options:

- If this is one of your first installations or you are not sure about the exact amount of time that the installation will take, you may upload a quote with your **hourly rate**. Additionally, you must include transportation costs, additional materials and other costs if applicable.
E.g. Quote with hourly rate:
 - Hourly rate: 100 £/hour
 - Transportation: 100 £
 - Cabling: 100 £
- On the other hand, if you have sufficient experience and you wish to, you may upload a quote with the **final cost**, but transportation costs, additional materials and other costs must be broken down.
E.g. Quote with final cost:
 - Total hours: 300 £
 - Transportation: 100 £
 - Cabling: 100 £
 - Total: 500 £ + VAT

Choose file [Browse](#)

Are you sure you want to add this new file?

[Close](#) [Confirm](#)

Figure 43 Installer's Journey: Quote

The installer will receive an email informing them if their quote has been selected or rejected.

4.3.5 Register equipment

All Stemy Equipment the Installers receive must be registered in the portal to successfully complete an installation (Figure 44). They must always register Stemy Equipment by adding a new device in 3.3.6 My Stemy Equipment (A). There are two steps related to this registration:

- Individually **register the Stemy Equipment (B)**:
 - Serial Number
 - Control Code
- The day of the installation: individually **activate the Stemy Equipment**

Installers can install any authorised device. It is a good idea to register more than one unit before the installation, so if one fails, they have a registered backup available.

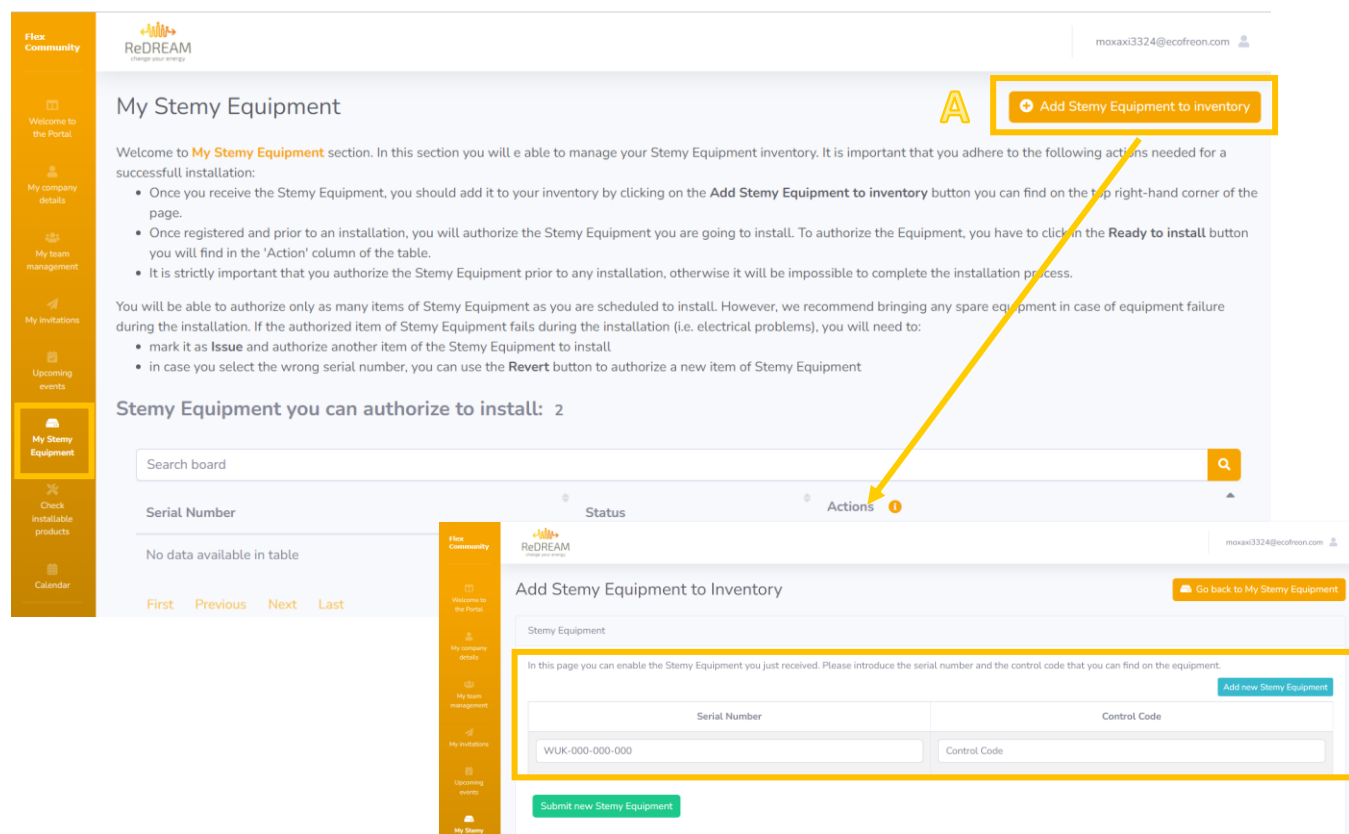


Figure 44 Installer's Journey: Register Equipment

4.3.6 Installation Visit

Installers will be notified if their quote has been selected. Then, they will proceed to schedule the installation visit (Figure 45).

Please, **call the telephone number** provided by the Consumer and then register the date of the installation. They can make more than one installation visit if necessary.

An email will be sent to both the installer and the Consumer to confirm the date of the installation visit.

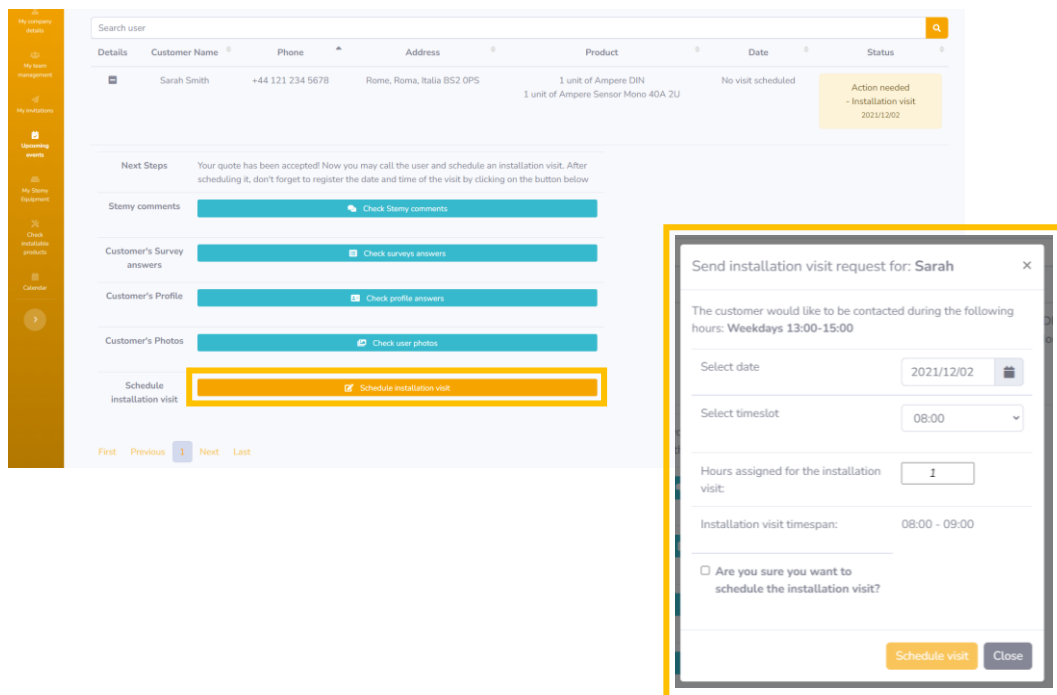


Figure 45 Installer's Journey: Installation Visit

4.3.7 Authorise Stemy Equipment

The installer must activate the specific Stemy device the day of the installation in My Stemy Equipment (Figure 46).

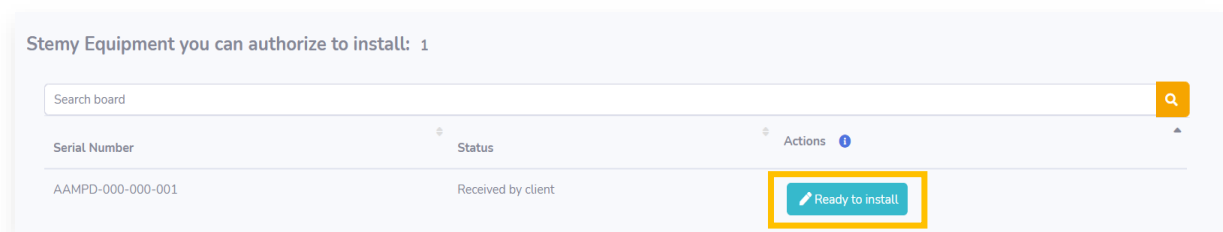


Figure 46 Installer's Journey: Authorise Stemy Equipment

4.3.8 Installation

Once the above steps have been completed and the installation has been authorised, the installer can proceed with the installation (Figure 47).

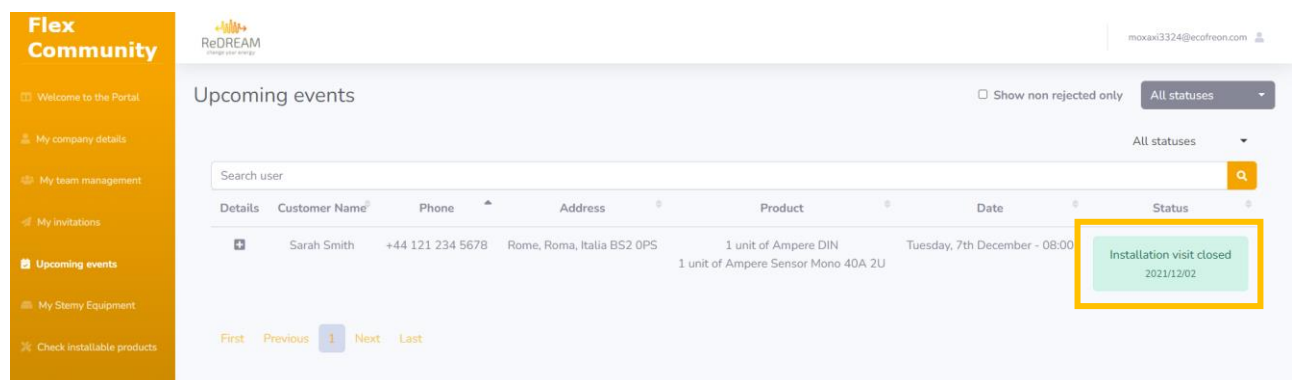
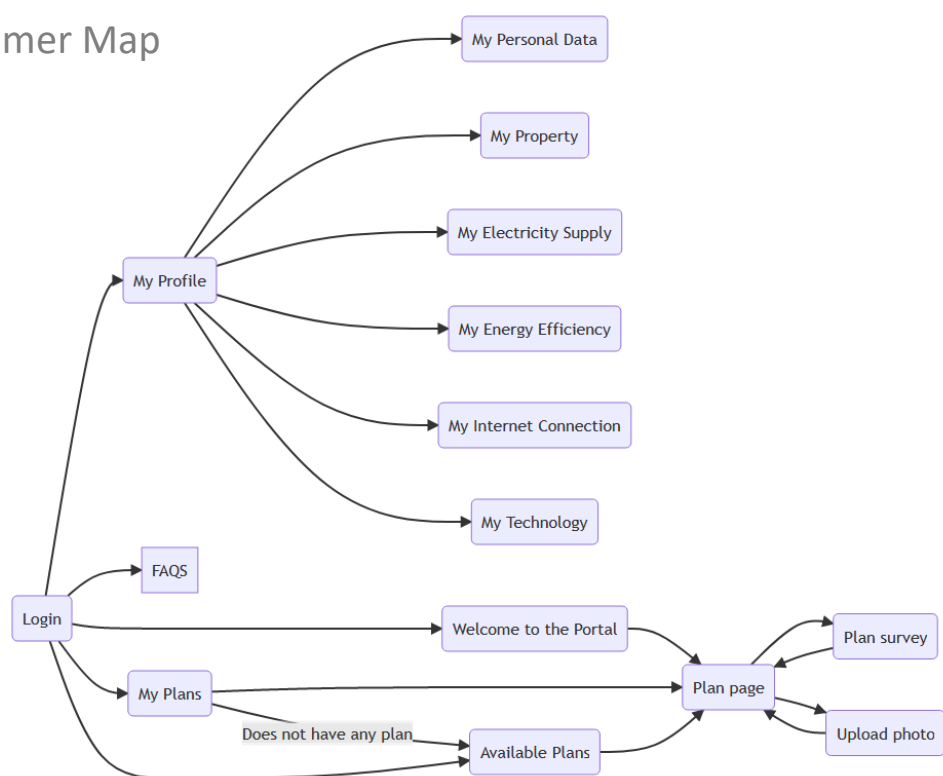


Figure 47 Installer's Journey: Installation

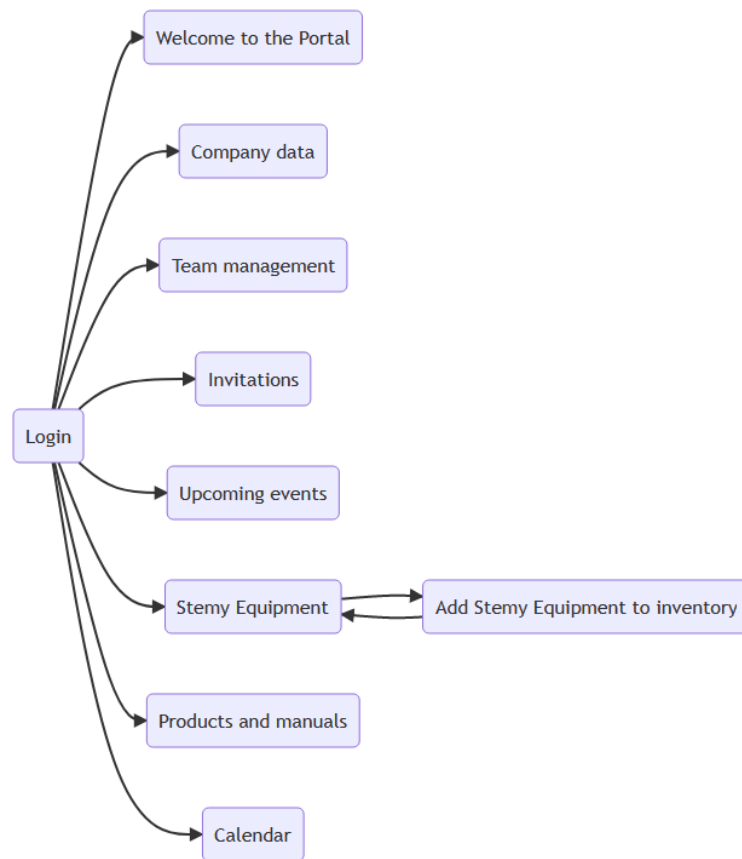


Annex 1. Website Structure Map

Consumer Map



Manager Map



Installer Map

