



ReDREAM
change your energy

D2.2 Second version of Energy Ecosystem

June 2022



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement N°957837

Technical References

EU Initiative	Horizon 2020 H2020-LC-SC3-2020-EC-ES-SCC
Grant Agreement Nr.	957837
Project Acronym	ReDREAM
Project Title	Real Consumer Engagement Through A New User-Centric Ecosystem Development for End-Users' assets In A Multi-Market Scenario
Project Coordinator	Universidad Pontificia Comillas
Project Duration	36 months

Deliverable No.	D2.2	
Dissemination level ¹	Public	
Work Package	WP2	
Task	T2.1 - ENERGY ECOSYSTEM DEVELOPMENT AND INTEROPERABILITY CONSUMER-GRID	
Lead beneficiary	STEMY	
Responsible Authors	<i>Ada Pouseu, Lorenzo Ramponi</i>	
Other authors/contributors	<i>Stemy</i>	<i>Ada Pouseu, Lorenzo Ramponi, Carlos Álvarez</i>
	<i>Rimond</i>	<i>Hamed Abbasi, Andreea Miroslav</i>
	<i>Soulsight</i>	<i>Juan Martino</i>
	<i>Comillas</i>	<i>Francisco Martín Martínez, Teresa Freire, Ruben Rodriguez, Olga Rico</i>
	<i>ENER</i>	<i>Maria Regidor</i>
	<i>ZeZ</i>	<i>Lucija Nad, Mislav Kirac</i>
	<i>BWCE</i>	<i>Alison Turnbull, Pete Capener, Julia</i>
	<i>BIO</i>	<i>Andrea Ferrante, Giacomo Nardoni</i>
Contributing beneficiary(ies)	Direct: Soulsight, Comillas and ZEZ, BWCE, BIO, ENER (Feedback, translations and design preferences)	
Due date of deliverable	<i>30-June 2022</i>	
Actual submission date	<i>13 July 2022</i>	

¹ PU = Public

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

RE = Restricted to a group specified by the consortium (including the Commission Services)

CO = Confidential, only for members of the consortium (including the Commission Services)

Review

Reviewers	Stefano Converso (RIMOND), Juan Martino (SOULSIGHT)
Reviewing period	From 1/06/2022 to 11/07/2022
Approved by reviewers	YES

Document History

Issue	Date	Author	Comments
v0.0	05/01/22	Carlos Becker	Beginning of the document with the approved index from PC
v0.1	20/01/22	Ada Pouseu, Valeria Pascual	Improve the first version of the document with a more detailed description of each webpage, new figures and format corrections.
v0.2	25/01/22	Lorenzo Ramponi	Update Web Map and review descriptions are given of the new developments
V1	30/05/22	Lorenzo Ramponi	Update introduction and summary
V1.1	10/06/22	Lorenzo Ramponi	Check Grammar and minor issues
V1.2	24/06/22	Lorenzo Ramponi	<p>Include feedback from PO, exclusive web for redream demos, Include REDREAM on those demos that want to use it as brand, and powered by REDREAM in the ones that want to use Flex Community as brand.</p> <p>Include the API information in this new page to be easily find and highlight the deliverable D2.6.</p>
V1.3	29/06/22	Ada Pouseu, Valeria Pascual	Update figures after last changes.
V1.4	05/07/22	Lorenzo Ramponi	Answer some of the comments from Stefano Converso and Juan Martino
V1.5	06/07/22	Ada Pouseu, Valeria Pascual	Create new figures and establish the relation inside ReDREAM project
V1.6	11/07/22	Badr Ghorbal	Last PC format changes
V1.7	26/07/22	Francisco & Badr	PC protects sensitive information

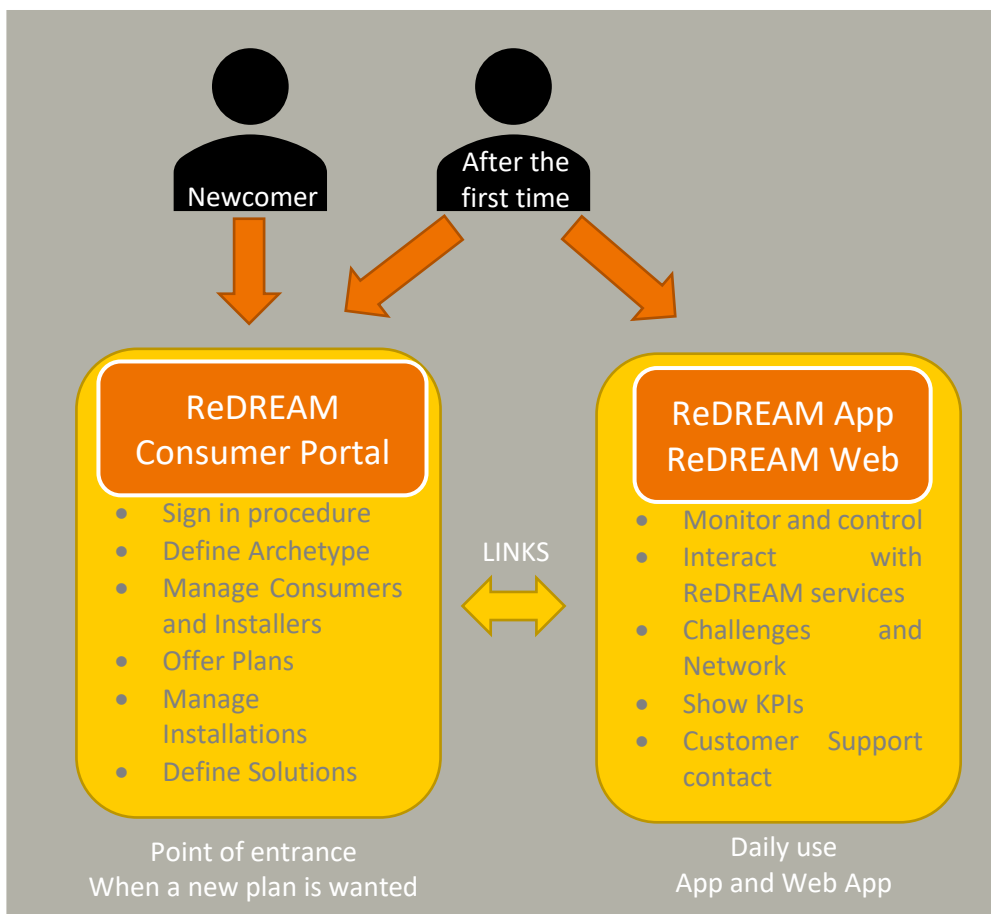
Summary

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

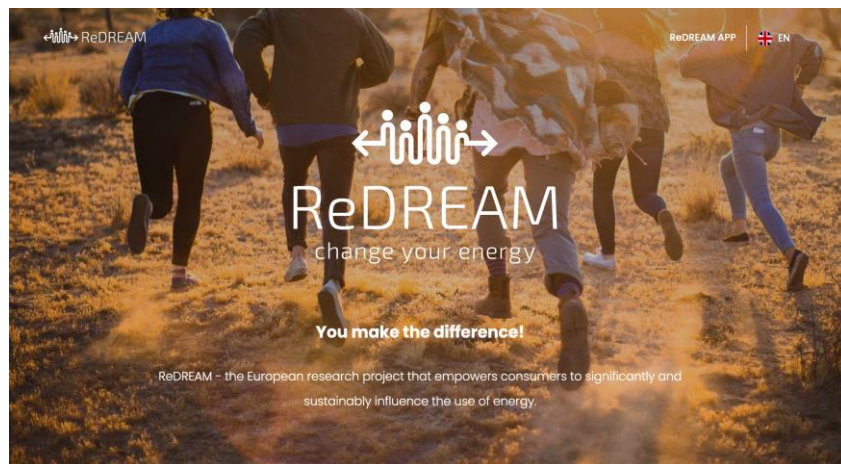
The Ecosystem is composed of five layers, all developed through WP2 and WP3 tasks. This deliverable D2.2 is an updated version with feedback of D2.1. Each section presents updated images and the description with the new features if a comparison with D2.1 wants to be done. The integration with the ReDREAM App is also stated.



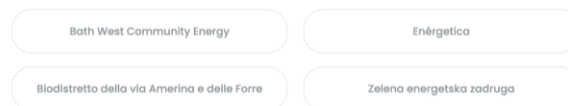
Before starting to use the Ecosystem, a preselection should be done to guarantee users are eligible ReDREAM participants. The Consumer Portal (web interface of a platform with different resources) has been created to be a tool for the DEMO leaders to involve the consumers they have recruited using the existing Flex Community portal that has been empowered with consumer awareness and

consumer engagement feedback developed early on in ReDREAM project. In D2.1, the first version of the deployment was shown.

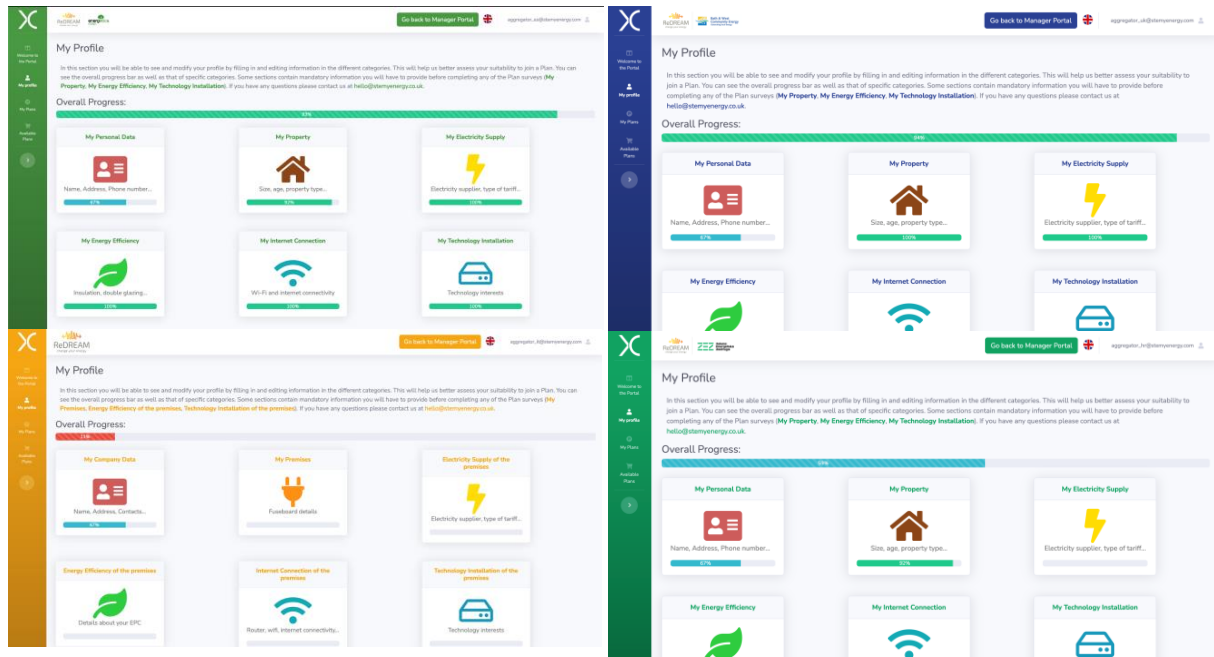
Another objective of this Portal is to offer plans and create solutions for consumers. Plans are the technological offer to control existing technologies or to help users to install new Equipment. Consumers will be required to fill out their profiles to design the best solution for them. Energy Communities or Managers can have access to the information they have supplied to help them find the optimal solution. Finally, Managers will also select which installers' offer is the one that best adapts to their needs. In summary, the Portal is an asset for carrying out the onboarding process of the consumers, the design of the solutions, and their installations before using the rest of the Ecosystem. All of them are found in <https://redream.energy/>. A communication plan and strategy will be developed to study the possibility of including this in the official web of the project.



Enter in your Demo portal



The feedback received by Stemy, Comillas, Soulsight and Demo leaders has allowed the Ecosystem to obtain a more customized experience with unique logos and colour design per Demo and more capabilities for consumers, but especially for managers. Managers can choose between following a customize portal with the desired brand or just keep the ReDREAM look and feel. They can introduce the plans they desired following the indications from D4.1 to achieve the KPIs. As stated in WP3 deliverables, there are four ReDREAM platform to guarantee the independence of each demo and allow customization in algorithms and interfaces.



The Portal also includes an openness section to show the work of task 2.5 since the technical information and demo accounts can be found in and specific section to be used by third parties' developments.

ReDREAM Energy API, Comfort API and Mobility API

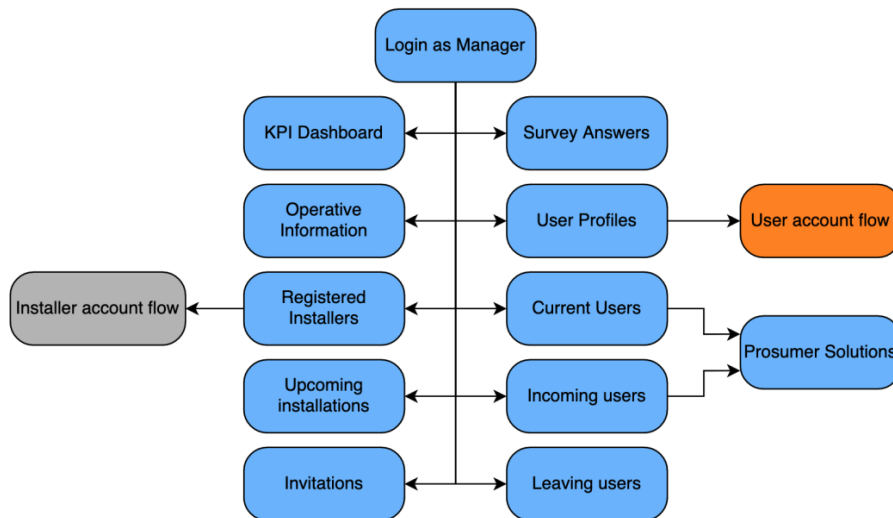
The documentation is divided in three API regarding three different purposes. All three APIs are documented in the **D2.6: Co-creative connection with third parties and devices** document.

- The comfort API allows users or services to retrieve data related to thermal comfort (e.g. air temperature, humidity, air quality, etc). The Comfort API is documented using the OpenAPI standard.
- The energy API allows users or services to retrieve data related to their energy usage, sensor data, Key Performance Indicators; and interact with their smart devices such as thermostats, electric vehicles charging posts, etc.
- The mobility service has the role of providing a simulation infrastructure for forecasting the impact of mobility on energy consumption & charging, and gas emission. It means that the mobility service implements a simulator that evaluates the: a) the quantity of energy (litres of gasoline, watts for electricity) that is consumed by the mobility mean used by the prosumer depending on the daily trip behaviour of this prosumer; b) consumption of energy at home for charging EV when it is plugged on ECP; c) emission of CO2 gas by the mean of transport (excluding EV that is assumed to not emit CO2).

Energy API credentials:		
Manager user:	Password:	URL:
redream-energy-manager@stemyenergy.com	Footer4-Expand-Surely	https://stemyenergy.cloud/redream/it/v2
Customer user:	Password:	URLs:
redream-energy-customer@stemyenergy.com	Everyday-Sapling-Relieve3	https://stemyenergy.cloud/redream/uk/v2 https://stemyenergy.cloud/redream/hr/v2 https://stemyenergy.cloud/redream/sp/v2 https://stemyenergy.cloud/redream/it/v2
Mobility API credentials:		
User:	Password:	URL:
test_mobility	test@mobility	http://h2020-redream.utbm.fr/
Comfort API URL:		
URL: http://morpheus.thermo.mech.ntua.gr/		

Furthermore, Managers have new pages with more information about the users and new filters have been added to different pages to improve the navigation experience. In addition, managers can also have access now to the installer portal to help them in the same way they could help users in the usage

of the web. On the other hand, Consumers will find a simpler survey to assess if they are suitable for the flexibility plan, if so, then they will face a second survey to establish the solution.



Finally, more steps in the ecosystem journey have been added to clarify who is responsible for each step and clarify the specific action. In particular, stages 4,5, 17 related of when the ReDREAM App can be used, stages 9 and 10 related to T&C and phases 11 and 12 related to the solution and the installation.



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 proposal) and platforms
Platform	A platform can be defined as a group of interfaces, software services and databases that has a common functionality. For instance: The Energy Service Platform, Mobility Platform...In ReDREAM we will speak about only a platform that ensemble of ReDREAM services (Demand Response, Energy Efficiency, Advisory Tool, etc.), third-party services (Weather Channel, Energy Markets), and databases that configure the ReDREAM software solution.
Portal	Portal is a sort of "start page" that contains links to a variety of resources and services
App	An application that offers a clear and focused service.
ReDREAM Consumer Portal	Final clients will join the ReDREAM Ecosystem through the Web portal (named ReDREAM Consumer Portal). Described in this deliverable. In this case, this Portal is in charge of Sign in procedure; Define Archetype; Allow Demo leaders to Manage Consumers and Installers; Offer Plans; Manage Installations; and Define Solutions.
ReDREAM App	The web or mobile interface of daily use for ReDREAM participants to know the status of their devices and interact with services. Described in D2.3. This App will Monitor and control devices; Interact with ReDREAM services; Challenges and Network; Show KPIs and Customer Support contact

Disclaimer

This publication reflects only the author's view. The Agency and the European Commission are not responsible for any use that may be made of the information it contains. All names or addresses appearing in the report are fictitious and have only been used for test purposes.

Table of Contents

Summary	5
Table of acronyms	9
List of Tables	14
List of Figures	15
1. Introduction.....	17
1.1. Main changes with respect to D2.1	19
2. Main Agents and their functionalities in the Consumer Portal	23
3. Portal structure	24
3.1. Consumer Portal	24
3.1.1. Welcome to the Portal.....	24
3.1.2. My profile.....	25
3.1.3. Available Plans	26
3.1.4. My Plans.....	27
3.1.5. Invitations	28
3.1.6. Frequently Asked Questions (FAQ).....	29
3.2. Energy Community or Manager Portal	30
3.2.1. Survey answers	31
3.2.2. User profile	32
3.2.3. Current User.....	33
3.2.4. Incoming User	33
3.2.5. Leaving User.....	35
3.2.6. Invitations	35
3.2.7. Upcoming installations	36
3.2.8. Registered Installers	36
3.2.9. Dashboard of KPIs.....	37
3.2.10. Operative Information	39
3.3. Installer Portal.....	39
3.3.1. Welcome to the Portal.....	39
3.3.2. My company details.....	40
3.3.3. My team management	41
3.3.4. My invitations	42
3.3.5. Upcoming events	42
3.3.6. My Stemy Equipment	43
3.3.7. Check installable products	44
3.3.8. Calendar	44
4. Journey of the main agents in the Consumer Portal.....	46
4.1. Consumer's journey	48
4.1.1. Sign up	48
4.1.2. Complete your Profile.....	48
4.1.3. Request a Plan	49
4.1.4. Sign T&Cs	50
4.1.5. Installation Visit	51
4.2. Energy Community or Manager's journey	51
4.2.1. Sign up	52
4.2.2. Invitation to Access.....	52
4.2.3. Suitability Assessment (Steps 2,3 & 4).....	53

- 4.2.4. Creating a solution 54
- 4.2.5. Assigning installers..... 54
- 4.2.6. Quote Acceptance 55
- 4.2.7. Finished Installation..... 55
- 4.2.8. After the Process..... 55
- 4.3. Installer’s journey 56
 - 4.3.1. Sign up 56
 - 4.3.2. New Consumer 56
 - 4.3.3. Consumer Information..... 57
 - 4.3.4. Quote 57
 - 4.3.5. Register equipment 58
 - 4.3.6. Installation Visit 59
 - 4.3.7. Authorise Stemy Equipment..... 60
 - 4.3.8. Installation 60
- Annex 1. Consumer Portal Structure Map 61**
 - 1.1 Consumer Map..... 61
 - 1.2 Installer Map 61
 - 1.3 Manager Map..... 62

List of Tables

Table 1 Main functionalities of each agent in the Portal 23
Table 2 Forecasted Plans in ReDREAM..... 47

List of Figures

Figure 1 REDREAM Interfaces for the Ecosystem	18
Figure 2 Ecosystem Landing Page with a link to the Web App of ReDREAM	19
Figure 3 Ecosystem Landing Page: Links to specific sign-in.....	19
Figure 4 Ecosystem Sign-In Page Options for those Demos that want to use Flex Community powered by ReDREAM as a label (left) and the ones that want to use REDREAM as a label (right).....	20
Figure 5 Ecosystem Landing Page: REDREAM API section.	20
Figure 6 Demo Logos: Italian want to use just the REDREAM logo, whereas the rest want to use the combination.....	21
Figure 7 Customization on the top and left side menu.....	21
Figure 8: Link to REDREAM Apps.....	22
Figure 9 Consumer: List of interfaces.....	24
Figure 10 Consumer: Welcome to the Portal.....	25
Figure 11 Consumer: My profile.....	26
Figure 12 Consumer: Available Plans	27
Figure 13 Consumer: Example of a plan.....	28
Figure 14 Consumer: FAQ.....	29
Figure 15 Consumer: FAQ.....	30
Figure 16 Manager: List of interfaces.....	30
Figure 17 Manager: Survey answers	32
Figure 18 Manager: Consumers Profile.....	32
Figure 19 Manager: Current Consumer	33
Figure 20 Manager: Incoming consumers.....	35
Figure 21 Manager: Leaving Consumers	35
Figure 22 Manager: Invitations	36
Figure 23 Manager: Upcoming Installations to be developed	36
Figure 24 Manager: Registered Installers to be developed	37
Figure 25 Manager: Dashboard of KPIs.....	38
Figure 26 Manager: Operative Information	39
Figure 27 Installer: List of interfaces	39
Figure 28 Installer: Welcome to the Portal	40
Figure 29 Installer: My company details	41
Figure 30 Installer: My team management.....	41
Figure 31 Installer: My invitations.....	42
Figure 32 Installer: Upcoming events to be developed	43
Figure 33 Installer: My Stemy Equipment to be developed.....	44
Figure 34 Installer: Check installable products to be developed	44
Figure 35 Installer: Calendar to be developed	45
Figure 36 Global Consumer Portal Journey.....	46
Figure 37 Consumer Journey.....	48
Figure 38 Consumer Journey: Complete your Profile	49
Figure 39 Consumer Journey: Request a Plan	49
Figure 40 Consumer Journey: Sign T&C	50
Figure 41 Consumer Journey: Installation Visit.....	51
Figure 42 Manager's Journey	51
Figure 43 Manager's Journey: Invitation to Access.....	52
Figure 44 Manager's Journey: Suitability Assessment	54
Figure 45 Manager's Journey: Assigning installers	54
Figure 46 Manager's Journey: Quote Acceptance	55

Figure 47 Installer’s Journey..... 56

Figure 48 Installer’s Journey: New Consumer 57

Figure 49 Installer’s Journey: Consumer Information..... 57

Figure 50 Installer’s Journey: Quote 58

Figure 51 Installer’s Journey: Register Equipment..... 59

Figure 52 Installer’s Journey: Installation Visit..... 59

Figure 53 Installer’s Journey: Authorise Stemy Equipment 60

Figure 54 Installer’s Journey: Installation..... 60

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. 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 energy and non-energy services, gamification, and advisory tool. This layer will be completed in WP3.

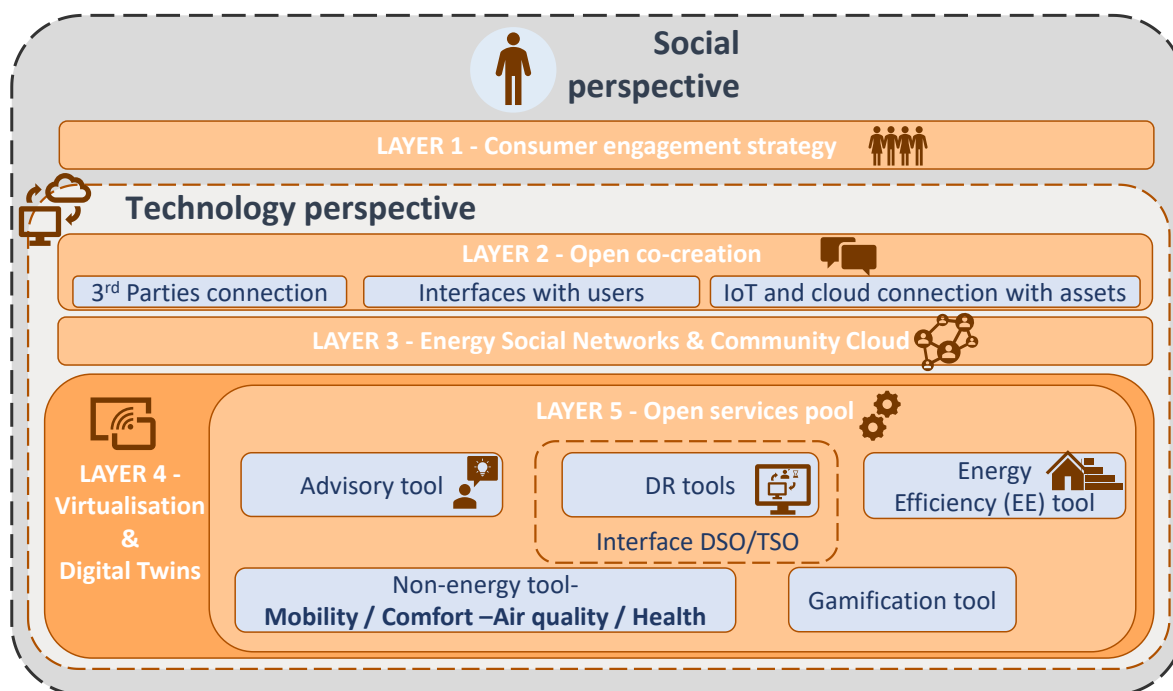


Figure 1 REDREAM Ecosystem

The web portal described in D2.1 has been updated to become the management portal and the initial step for the participants of ReDREAM being just a part of the whole Ecosystem. The full ReDREAM Ecosystem is divided into five layers, and all of them are described along deliverables of WP2 and WP3 except the Portal for sign-up, invitations, installations, plans and client data which is the one described in this deliverable D2.2. This web is called Consumer Portal since a portal is a sort of "start page" that contains links to a variety of resources and services that, in this case, are related to

the Consumer information and installations that should be used at the beginning or to manage the installation of new devices. Thus, the Ecosystem from the point of view of interfaces can be represented in

Figure 1, where the interfaces related to the daily interactions with services and devices are also shown.

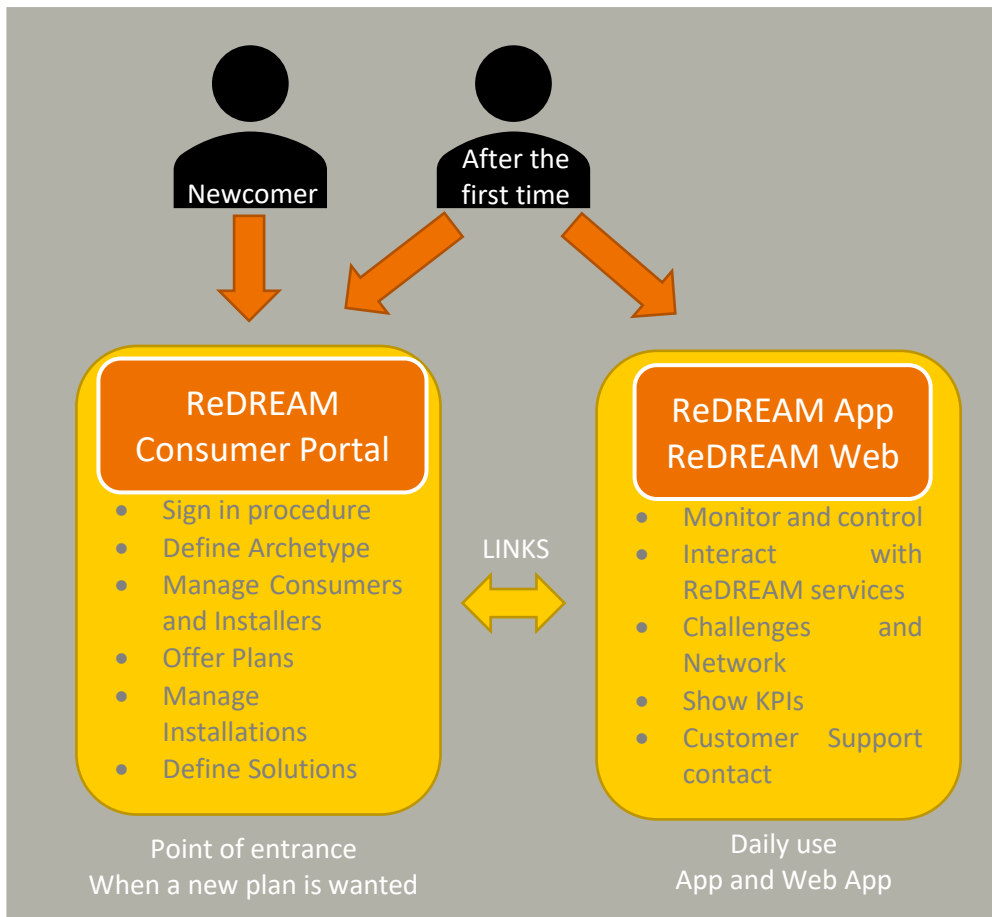


Figure 1 REDREAM Interfaces for the Ecosystem

This deliverable is focused on the explanation of the Prosumer portal with the following objectives:

- Implementation of a sign-up and register process for agents participating in the Ecosystem.
- Help in the selection of suitable consumers.
- Allow aggregators/managers to check the status of the installations.
- Allow aggregators/managers to analyse the KPIs of the portfolio.

The different kinds of participants and the cultural specificness of the Demo countries represent one of the biggest challenges to the Ecosystem's 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 Ecosystem easy to use is the language. Four different Ecosystem platforms (Figure 4) have been developed to accommodate the use of the respective national languages. Current Ecosystems are deployed in:

- Spanish Ecosystem: <https://es.redream.energy/redream-login/>
- Italian Ecosystem: <https://it.redream.energy/redream-login/>
- British Ecosystem: <https://uk.redream.energy/redream-login/>
- Croatian Ecosystem: <https://hr.redream.energy/redream-login/>

1.1. Main changes with respect to D2.1

This deliverable is an updated version of the D2.1 (where the first basic deployment was done taking the starting point of the Portal and the first comments from Demos and Social partners), but it adopts the same index structure to facilitate comparison. Several changes have been made to show the REDREAM project's relation with the initiatives of the demos. Each section presents updated images and the description with the new features if a comparison with D2.1 wants to be done. This facilitates the reading where the websites presented in the following sections are the result of the previous experience from Stemy plus the work during the months of WP2 and the feedback received by Comillas, Soulsight and Demo leaders.

The common URL to all ecosystems is <https://redream.energy/> (Figure 2). This page has a similar look and feels to the REDREAM official portal to be linked from it.

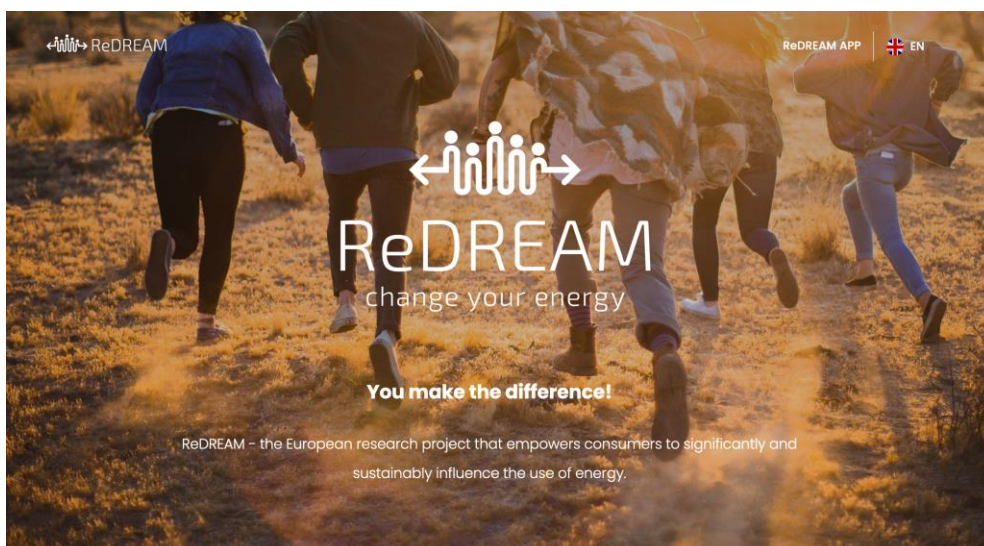


Figure 2 Ecosystem Landing Page with a link to the Web App of ReDREAM

From this page, the four specific logins can be found as shown in (Figure 3):

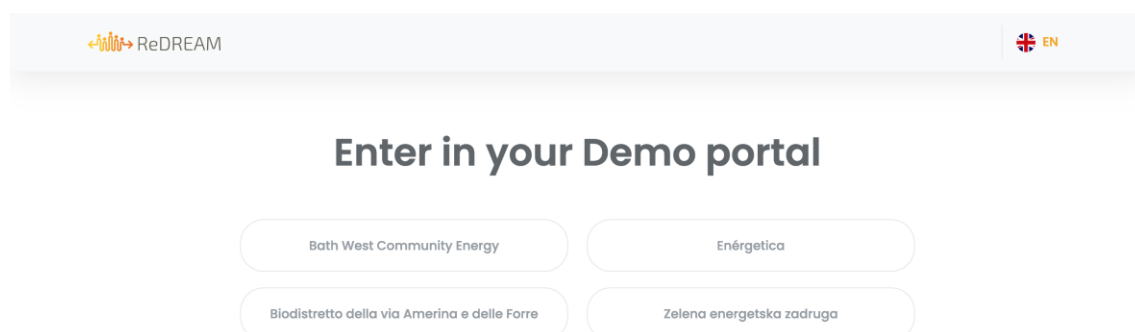


Figure 3 Ecosystem Landing Page: Links to specific sign-in.

DEMOS have also linked the web pages to their specific sign-in page (Figure 4) or the general one to be easily found by their REDREAM members. As far as there was already an awareness in some of the demos of the Flex Community name, it makes sense to continue using that name in some of them. In fact, some demos have expressed their interest in continuing with the Flex Community label, but it has been branded with REDREAM reducing the links that may cause confusion with other activities. Demos can choose which sign-in option they want.

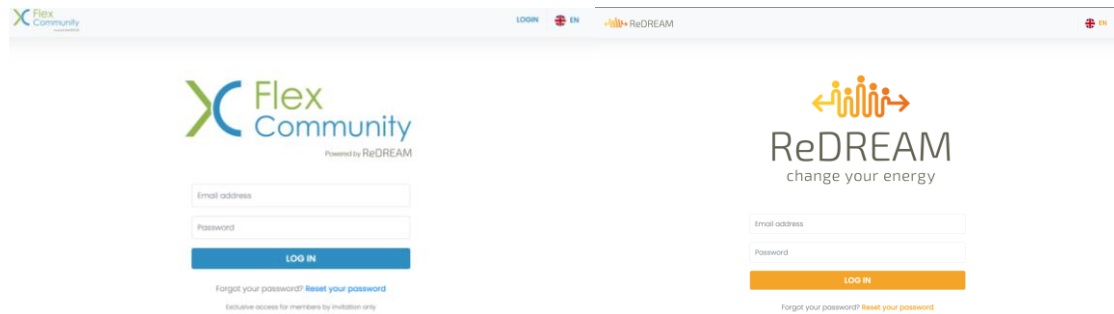



Figure 4 Ecosystem Sign-In Page Options for those Demos that want to use Flex Community powered by ReDREAM as a label (left) and the ones that want to use REDREAM as a label (right).

A section to show the openness has been added, including the technical information, and demo accounts can be found in and specific section to be used by third parties' developments.


EN

ReDREAM Energy API, Comfort API and Mobility API

The documentation is divided in three API regarding three different purposes. All three APIs are documented in the [D2.6. Co-creative connection with third parties and devices](#) document.

- The comfort API allows users or services to retrieve data related to thermal comfort (e.g, air temperature, humidity, air quality, etc). The Comfort API is documented using the OpenAPI standard.
- The energy API allows users or services to retrieve data related to their energy usage, sensor data, Key Performance Indicators; and interact with their smart devices such as thermostats, electric vehicles charging posts, etc.
- The mobility service has the role of providing a simulation infrastructure for forecasting the impact of mobility on energy consumption & charging, and gas emission. It means that the mobility service implements a simulator that evaluates the: a) the quantity of energy (litres of gasoline, watts for electricity) that is consumed by the mobility mean used by the prosumer depending on the daily trip behaviour of this prosumer; b) consumption of energy at home for charging EV when it is plugged on ECP; c) emission of CO2 gas by the mean of transport (excluding EV that is assumed to not emit CO2).

Energy API credentials:		
Manager user:	Password:	URL:
redream-energy-manager@stemyenergy.com	Footer4-Expand-Surely	https://stemyenergy.cloud/redream/it/v2
URLs:		
Customer user:	Password:	https://stemyenergy.cloud/redream/uk/v2
redream-energy-customer@stemyenergy.com	Everyday-Sapling-Relieve3	https://stemyenergy.cloud/redream/hr/v2 https://stemyenergy.cloud/redream/sp/v2 https://stemyenergy.cloud/redream/it/v2
Mobility API credentials:		
User:	Password:	URL:
test_mobility	test@mobility	http://h2020-redream.utbm.fr/
Comfort API URL:		
URL:		
http://morpheus.thermo.mech.ntua.gr/		

Figure 5 Ecosystem Landing Page: REDREAM API section.

In order to bring the Ecosystem closer to the participants of each Demo, it has been adapted to each country, personalising the internal website and having more REDREAM branding in texts and URLs. This document presents a static photograph of the landing pages of the Ecosystem. Each of the demos

has its logo together with the REDREAM one in the Portal following the comments from Social partners. The different logos are shown above in Figure 6.



Figure 6 Demo Logos: Italian want to use just the REDREAM logo, whereas the rest want to use the combination

As previously mentioned, the internal website of the Ecosystem has also been customized. This has been done by including the logo of the Demo leaders and their corporate colours in the top and left side menu to represent the look and feel of the organisation and enhance Consumer’s trust in the platform (Figure 7). In the case of the Italian Demo, they prefer to use a look and feel of just REDREAM.

For the purposes of this document, we will be using the Portal, personalized for the IT Demo, to showcase the current state of development of the ReDREAM Consumer Portal in the following sections.

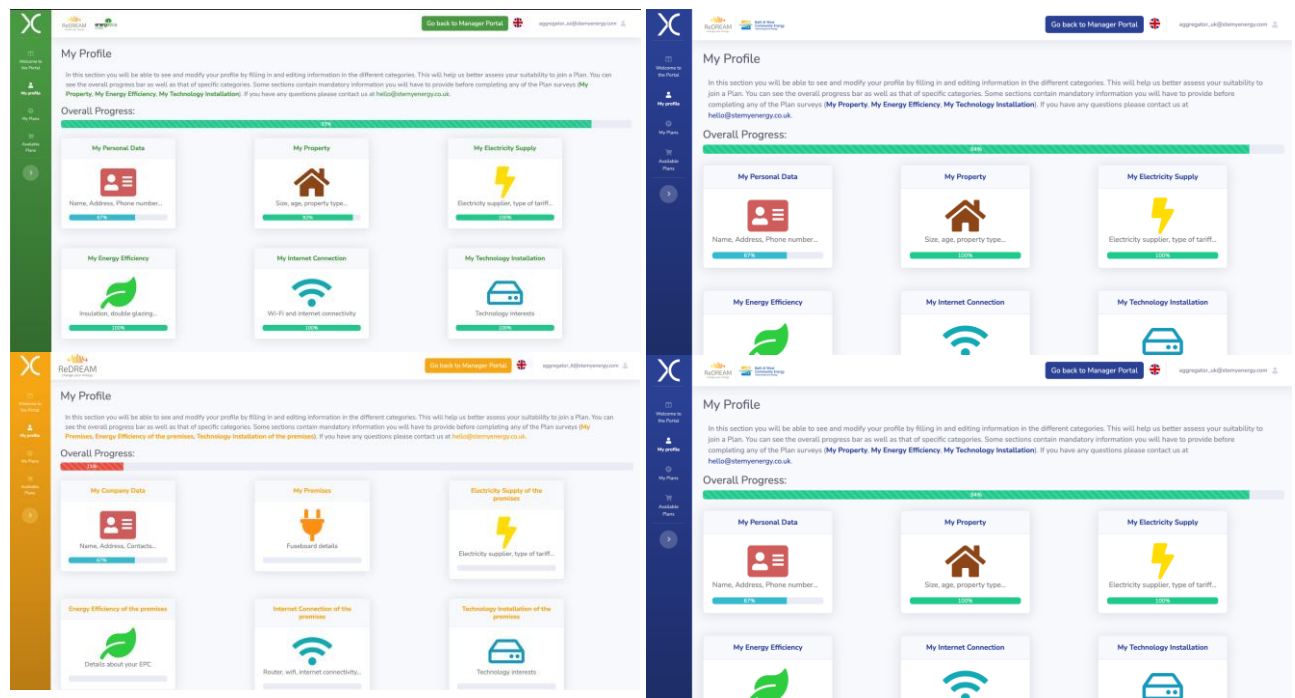


Figure 7 Customization on the top and left side menu

A final change is that REDREAM App has been included in the Portal to allow an easy installation once the production links for apps would be ready and DEMOS give the approval (Figure 8).

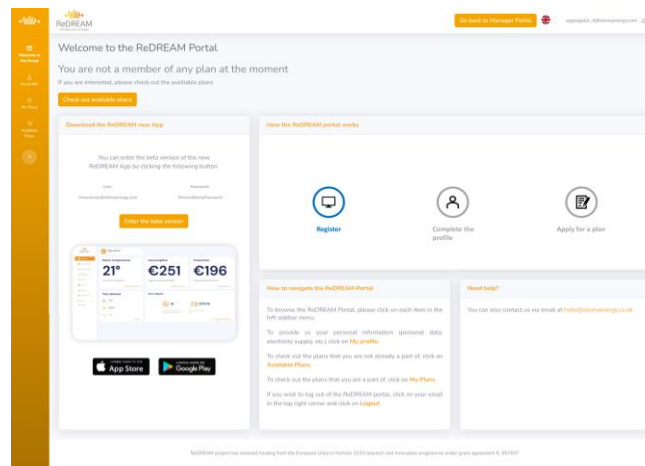


Figure 8: Link to REDREAM Apps

Additional changes developed from the work presented in D2.1 are listed here with a major description in their section:

- Global Changes:
 - Creation of a specific REDREAM Page for sign-in depending on the country. This page will be included in the project page and demo pages. The link flow among the official web project, demo webs, Consumer Portal and ReDREAM App will be revised in the following months.
 - Add information about REDREAM API.
 - Customization of landing pages and internal webs with unique logos and colour design.
 - Add more explanations and their respective language translations.
- Consumer Changes:
 - Allow Invitations on consumers' web and App
 - Include a section to download the REDREAM App and navigate to REDREAM Web App developed by RIMOND.
 - Add questions to the questionnaire to determine the knowledge of the consumer about energy.
- Manager Changes:
 - Allow having more offered plans that depend on the energy community's interests.
 - Add a new page with the operative information of the users.
 - Add a new page with the upcoming information of the users.
 - Add a new page with the registered installers
 - Added categories on the left sidebar
 - Add filter for the type of survey
 - Split the flexibility survey into two parts to reduce the time in a survey.
 - Access Granted to the installer portal
 - Add steps in the Consumer Portal journey

2. Main Agents and their functionalities in the Consumer Portal

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

Three main agents are interacting in the ReDREAM Portal:

1. **Consumer:** any user who wants to participate in controlling their energy or enable flexibility services through energy technology. Each electrical supply point id will have an admin user, and other users can be linked to that account. Once a potential consumer is registered in the Portal, they become a “User” for KPIs purposes. They will become “Consumers” after a plan with a smart meter is requested.
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:

Table 1 Main functionalities of each agent in the Portal

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
Publishes updates/sends data	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	

3. Portal structure

This section explains how the ReDREAM Consumer Portal 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. Second, the Energy Community or Manager Portal in section 3.2. Finally, 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 9), which are accessed through the side navigation bar as described below:

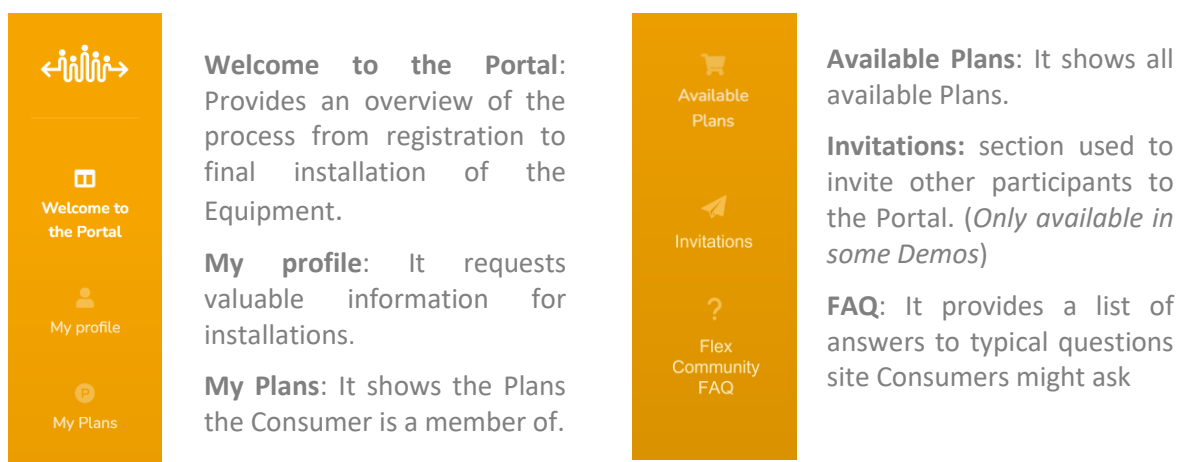


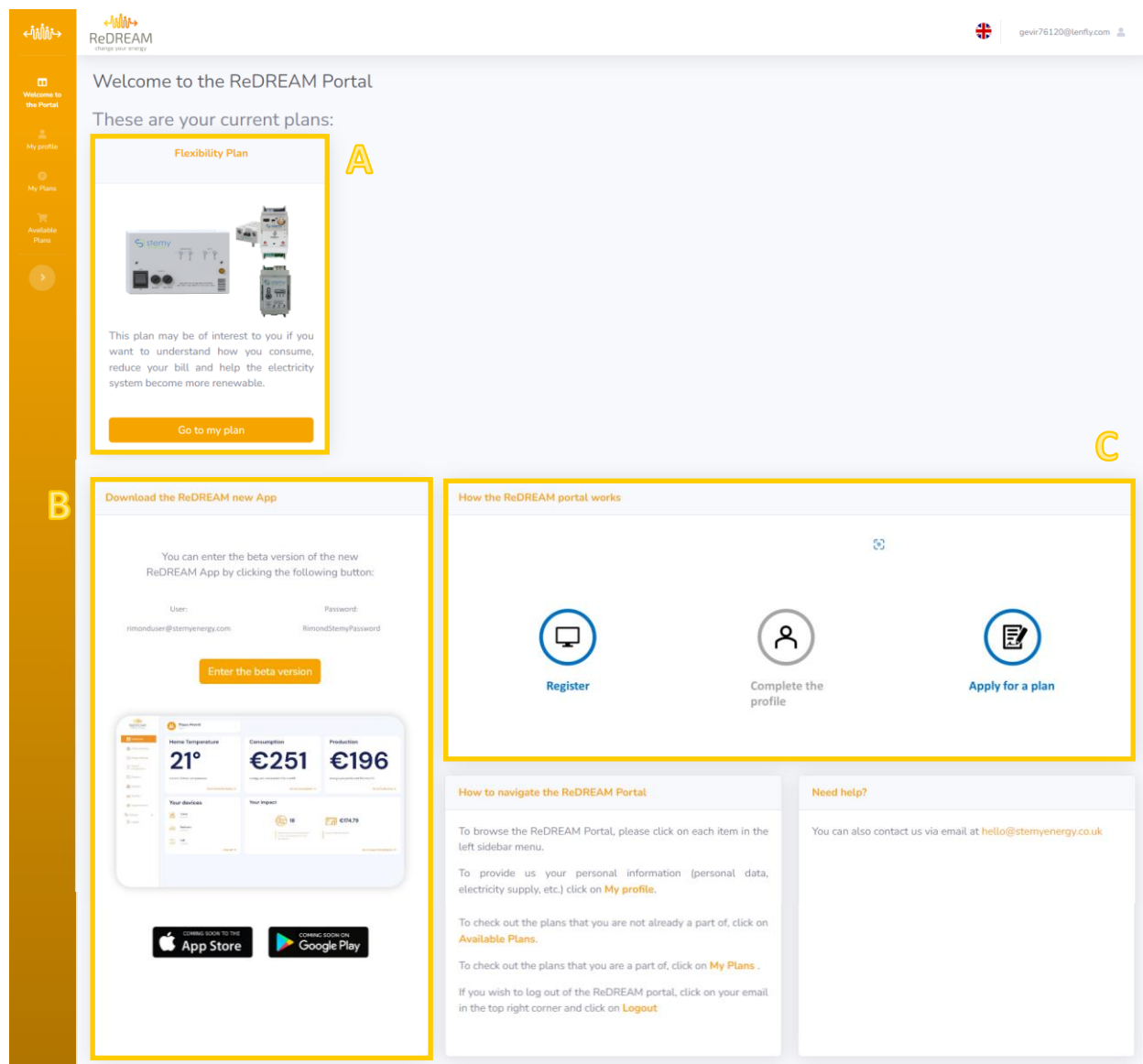
Figure 9 Consumer: List of interfaces

3.1.1. Welcome to the Portal

The Welcome page will give the Consumer an overview of the process from registration to the final installation of the Stemy Equipment. Its main objective is to help consumers know in which step they are at any given moment.

In Figure 10, the Consumer can see there are three differentiated areas:

- **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 on “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:** The Consumer 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.



Welcome to the ReDREAM Portal

These are your current plans:

Flexibility Plan

This plan may be of interest to you if you want to understand how you consume, reduce your bill and help the electricity system become more renewable.

Go to my plan

Download the ReDREAM new App

You can enter the beta version of the new ReDREAM App by clicking the following button:

User: rimonduser@stemyenergy.com Password: RimondStemyPassword

Enter the beta version

Home Temperature: 21°

Consumption: €251

Production: €196

Available on the App Store | GET IT ON Google Play

How the ReDREAM portal works

Register | Complete the profile | Apply for a plan

How to navigate the ReDREAM Portal

To browse the ReDREAM Portal, please click on each item in the left sidebar menu.

To provide us your personal information (personal data, electricity supply, etc.) click on **My profile**.

To check out the plans that you are not already a part of, click on **Available Plans**.

To check out the plans that you are a part of, click on **My Plans**.

If you wish to log out of the ReDREAM portal, click on your email in the top right corner and click on **Logout**.

Need help?

You can also contact us via email at hello@stemyenergy.co.uk

Figure 10 Consumer: Welcome to the Portal

3.1.2. My profile

My Profile section is composed of different categories each with specific questions that provide valuable information to the Installers and Energy Communities/Managers to succeed in any future installation of a device.

The information provided in each category helps Installers to have a general idea of the characteristics of each installation and helps ReDREAM better assess the Consumers' profile before becoming a member of the community. Information about bills and electrical characteristics of devices will 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 11), 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...). This new version includes additional questions related to Consumer knowledge of energy.

ZONE C: This section will assess Consumers' **energy efficiency** (insulation, double glazing...).

ZONE D: This section will ask Consumers 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.

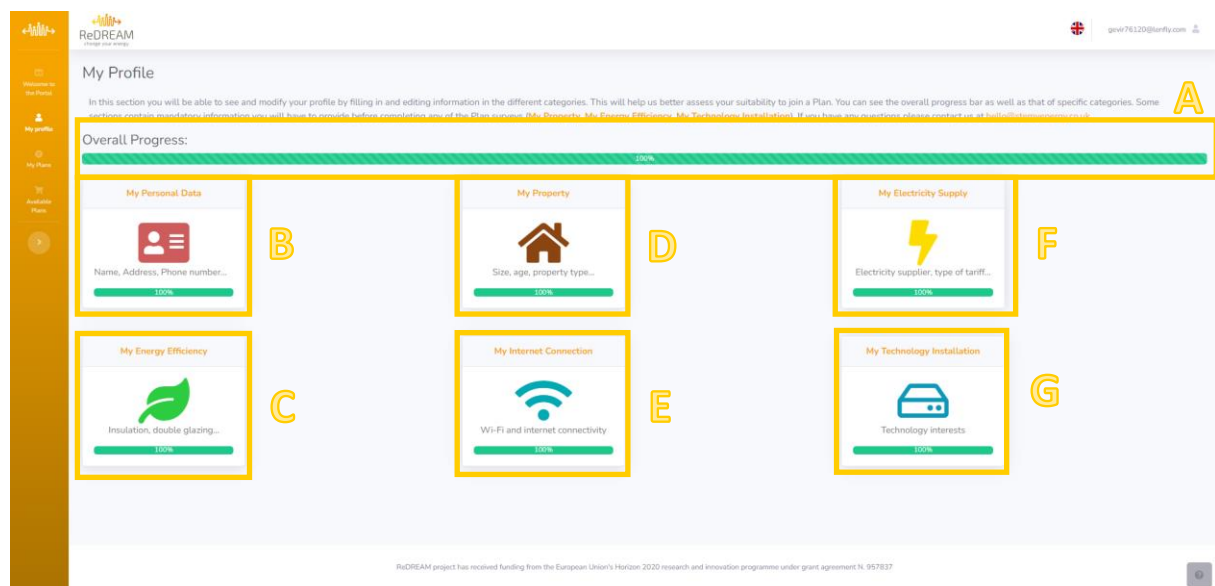


Figure 11 Consumer: My profile

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.

There are some Plans which are common to all Demos, such as Flexibility. However, more Plans can be offered depending on the necessities of each country and Demo (e.g., Heat Pump Plan, EVCP Plan, Solar Plan, etc.). Although new Plans may go beyond the project's goals they can serve as an

opportunity for Consumers to install new technologies. The ones forecasted by ReDREAM can be found in section 4.

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.

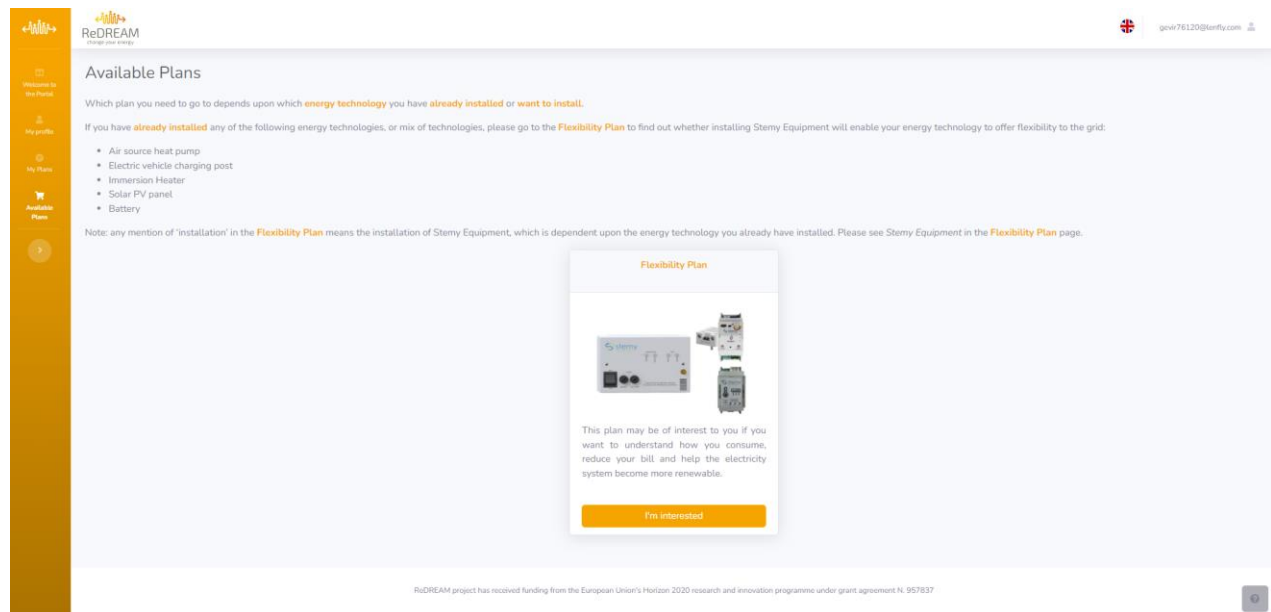


Figure 12 Consumer: Available Plans

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:

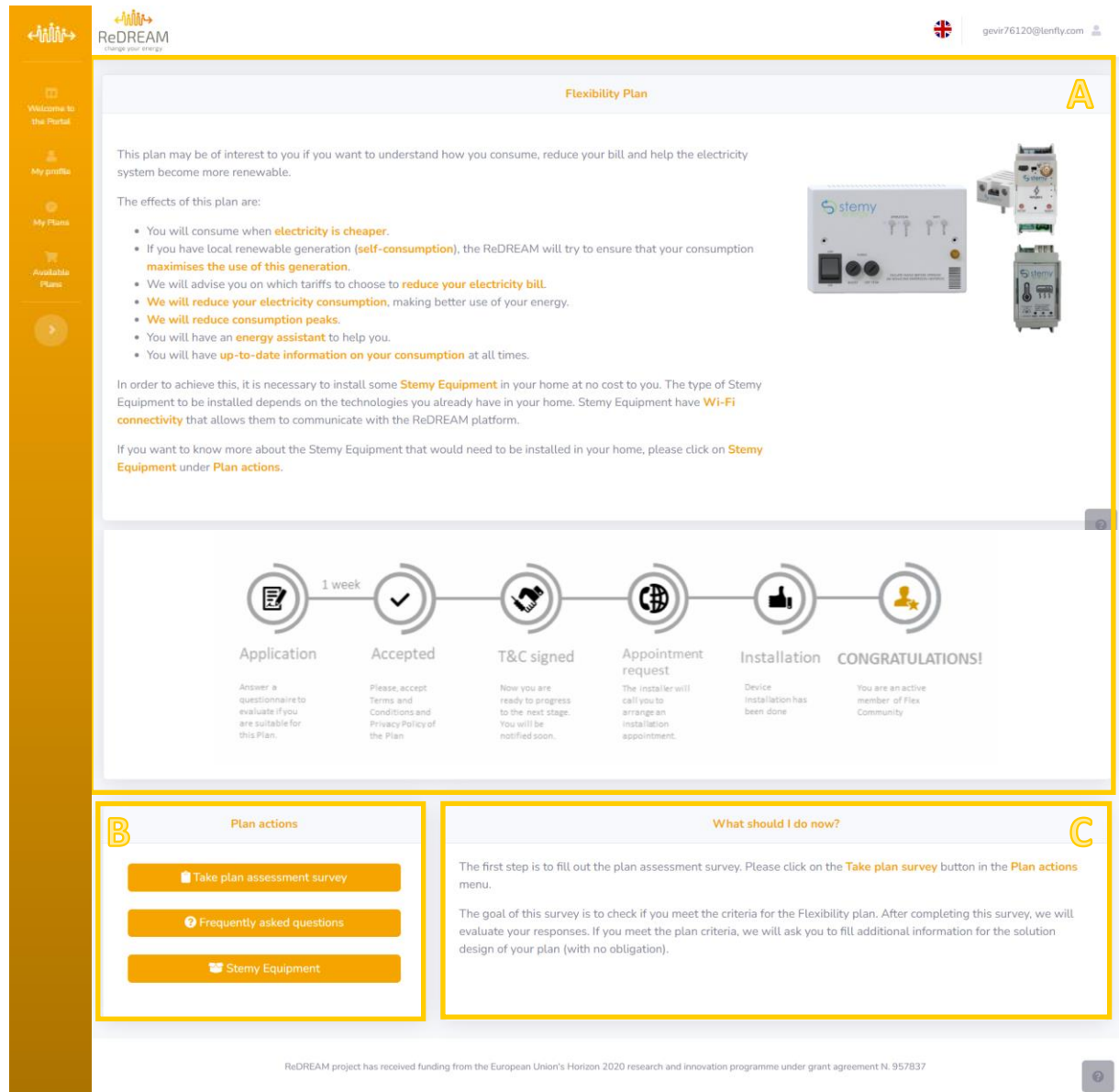
- Installers get relevant information about Consumers, helping them evaluate the needs of each installation.
- ReDREAM gets crucial data for the assessment of whether each Consumer is suitable for a specific Plan. The data provided in this section are also relevant for grant applications.
- Consumers 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 13. 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 an FAQ section solving frequently asked questions and further information regarding Terms & Conditions and Stemy Equipment as Consumers advance in the process.
- **Section C:** This section will guide the Consumer during the whole process by displaying the specific information of the next step.



Flexibility Plan

This plan may be of interest to you if you want to understand how you consume, reduce your bill and help the electricity system become more renewable.

The effects of this plan are:

- You will consume when **electricity is cheaper**.
- If you have local renewable generation (**self-consumption**), the ReDREAM will try to ensure that your consumption **maximises the use of this generation**.
- We will advise you on which tariffs to choose to **reduce your electricity bill**.
- We will reduce your electricity consumption**, making better use of your energy.
- We will reduce consumption peaks**.
- You will have an **energy assistant** to help you.
- You will have **up-to-date information on your consumption** at all times.

In order to achieve this, it is necessary to install some **Stemy Equipment** in your home at no cost to you. The type of Stemy Equipment to be installed depends on the technologies you already have in your home. Stemy Equipment have **Wi-Fi connectivity** that allows them to communicate with the ReDREAM platform.

If you want to know more about the Stemy Equipment that would need to be installed in your home, please click on **Stemy Equipment** under **Plan actions**.

1 week

Application
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

- Take plan assessment survey
- Frequently asked questions
- Stemy Equipment

What should I do now?

The first step is to fill out the plan assessment survey. Please click on the **Take plan survey** button in the **Plan actions** menu.

The goal of this survey is to check if you meet the criteria for the Flexibility plan. After completing this survey, we will evaluate your responses. If you meet the plan criteria, we will ask you to fill additional information for the solution design of your plan (with no obligation).

ReDREAM project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement N. 957837

Figure 13 Consumer: Example of a plan

3.1.5. Invitations

In this section, main Consumers (the one that register the first) will be able to invite other Consumer-users to the Portal to use the same devices the main consumer does (Other family members, employees...). Inviting other people is necessary for them to use some of the functionalities related to the Portal. For example, it is necessary in order to provide access to the App and control the already installed Devices.

The main Consumer can invite two types of Consumers:

- **Linked Consumers:** This Consumer is attached to the main Consumer that invited them (usually a family member, somebody who lives in the same house, etc.). This type of Consumer allows Linked users to also visualize consumption data and remotely control energy resources.
- **New Consumers (*only available in some Demos*):** This type of Consumer will be a brand-new Consumer of the Ecosystem that has to register, complete the Profile and request a Plan. It is independent of the Consumer who invited them. This could be implemented in the App.

To generate an invitation, 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.

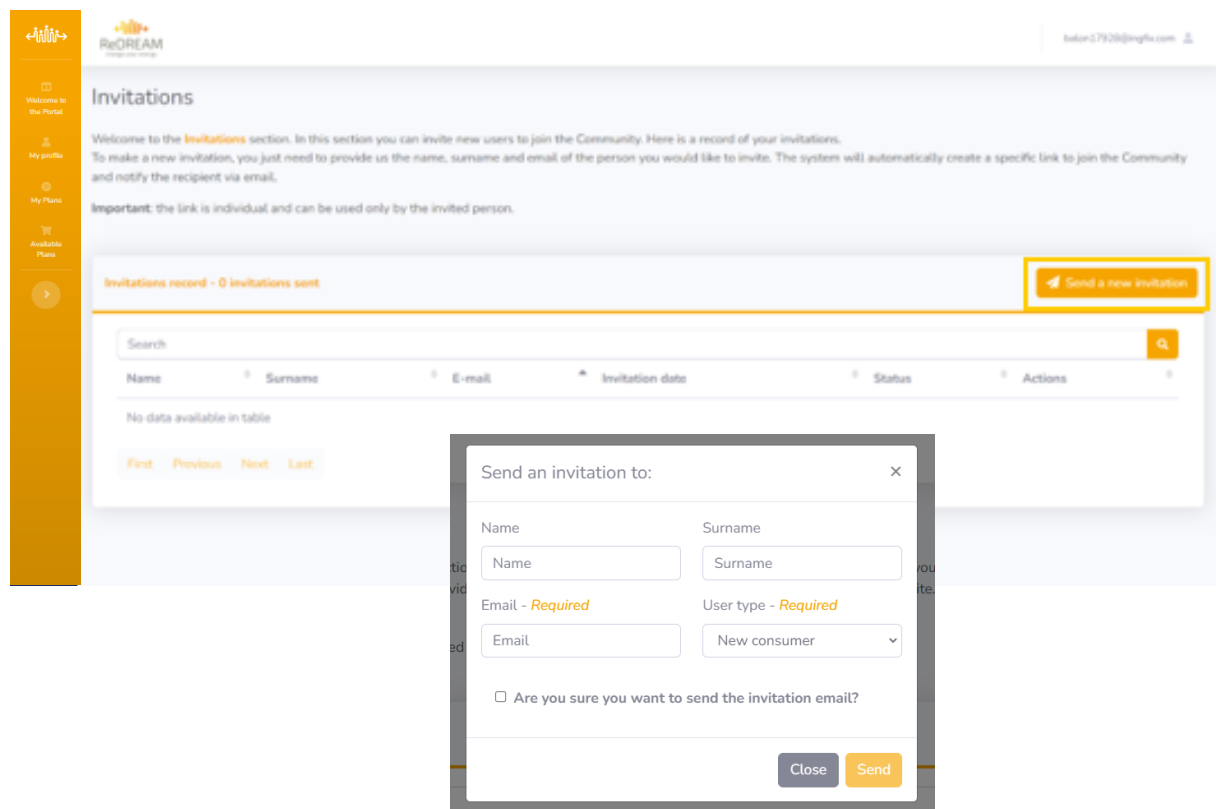


Figure 14 Consumer: FAQ

3.1.6. Frequently Asked Questions (FAQ)

As with any other website, the FAQ section (Figure 8) refers to a list of answers to typical questions site that Consumers might ask.

The questions shown in this section will vary depending on the type of Consumer (Residential, Commercial, and Industrial) based on 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.

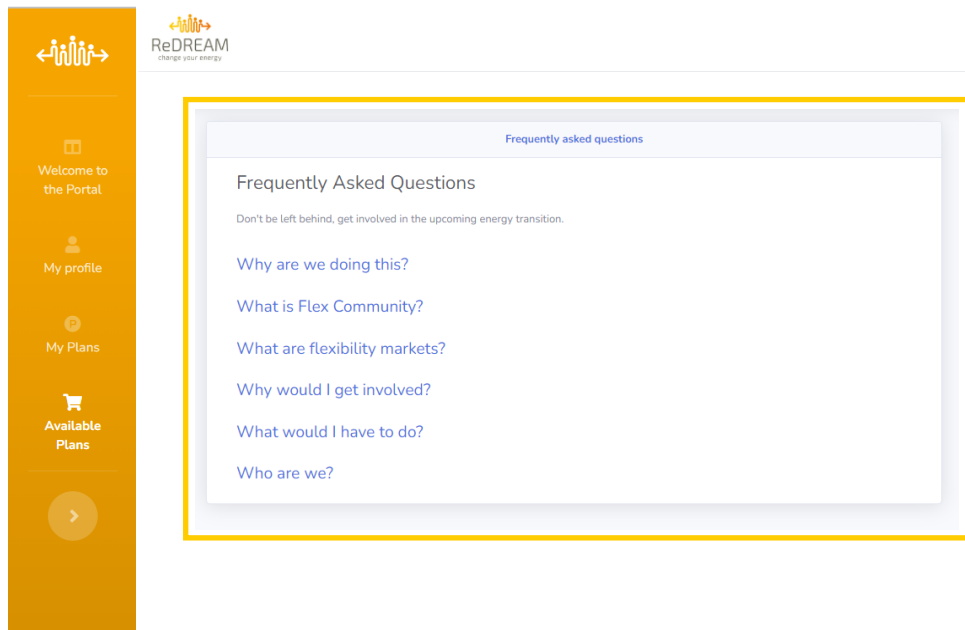


Figure 15 Consumer: FAQ

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 below:

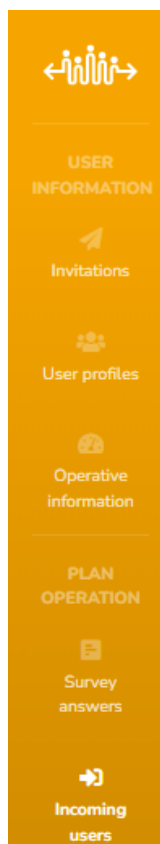
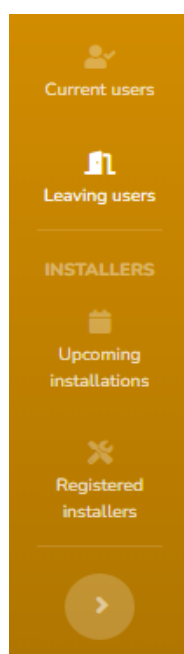
	<p>Invitations: section used to invite other participants to the Portal.</p> <p>User profiles: it shows the information related to the Consumer Profile.</p> <p>Operative information: table of participants with their installed devices and power by technology.</p> <p>Survey answers: it shows Consumers' answers to the Survey Plans. The manager will accept/reject the Consumer in this section.</p> <p>Incoming users: it shows Consumers who are in the process of completing a Plan and installing any equipment.</p>		<p>Current users: provides a list of all the Consumers who already have equipment installed.</p> <p>Leaving users provides a list of Consumers who have left the Plan.</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>
---	--	--	--

Figure 16 Manager: List of interfaces

The sections in the side navigation bar have been updated and reorganised into four categories respect D2.1:

- **User Information:** These sections contain general/non-Plan-related information about Consumers. They follow the order of the Consumers' process (e.g.: Consumers are first invited, then their Profile is reviewed and, when they join REDREAM, they generate energy data that is managed by the Energy Community/Manager).
- **Plan Operation:** these sections are directly related to all the actions necessary along the installation process. Thus, since Consumers request a Plan until they leave.
- **Installers:** All sections related to Installers are contained in this category, named Upcoming Installations and Registered Installers.
- **Dashboard:** The section in this category allows a general overview of the consumption and energy spending of all the participants managed by a Demo Leader.

All sections are ordered top-down in the side navigation bar, from the most specific and early in the process to the most general/high level and late in the process. These changes improve the Consumer Portal interface to make it more intuitive and easier to use.

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.

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.
- Filter by type of Survey (D).

A relevant change has been introduced in this version of the Consumer Portal, which is that the Flexibility Plan survey is split into two different surveys to simplify the process and improve the perceived time and effort spent in completing this survey. The name of this new survey is Solution Design Survey.

Because of this development, a new filter has been added to the Survey Answers section for Managers to choose which survey they would like to review (Assessment Survey or Solution Design Survey).



Figure 17 Manager: Survey answers

3.2.2. 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, 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 categorized by colour in the 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).

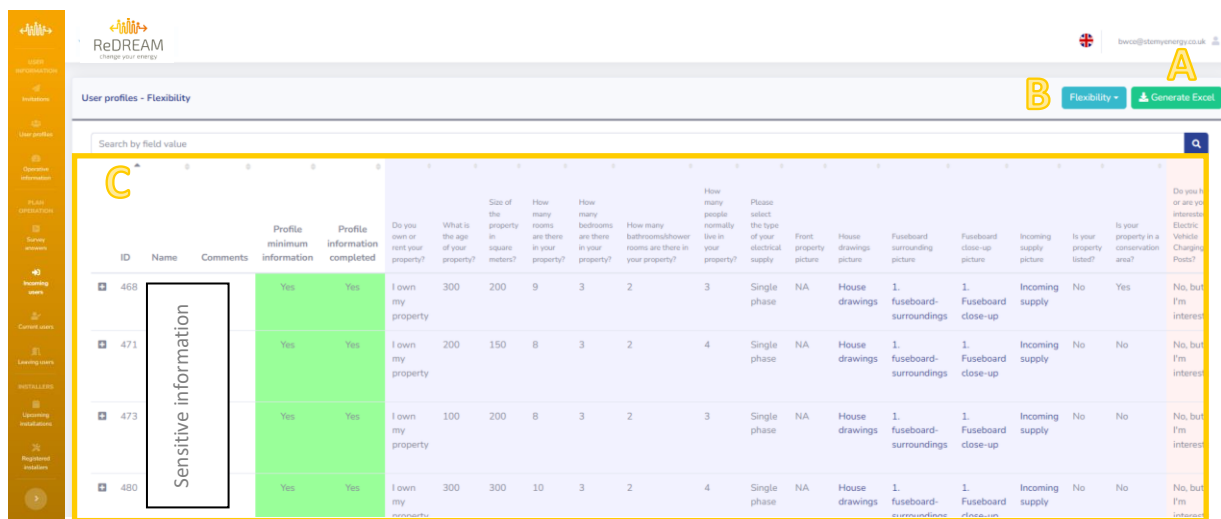


Figure 18 Manager: Consumers Profile

Three new columns were added to the C section for the Energy Community/Manager:

- Quickly access the latest **comments** that were made by Stemy or the Manager about each Consumer.
- Check if the Consumer has filled in the **minimum information of the Profile** (Property, Technology and Energy Efficiency sections).
- Check if the Consumer has completed **all the information on the Profile**.

3.2.3. Current 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 this screen 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.

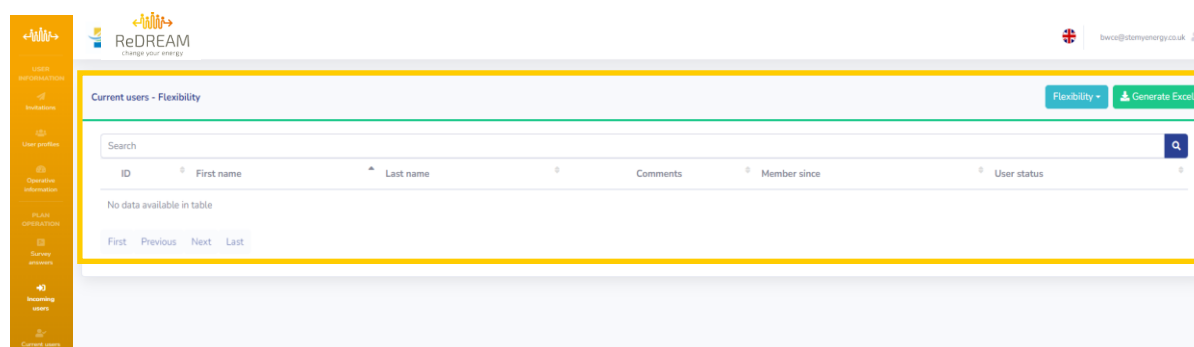


Figure 19 Manager: Current Consumer

3.2.4. Incoming User

This section provides the Energy Community and/or the Manager with an overall view of the status of Incoming Consumers. 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** related to signing the Terms & Conditions.

These are the different possible statuses:

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

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

The signature of the Terms & Conditions has been changed to go through a **three-step process** that is now shown in this section for Energy Communities/Managers to supervise if these steps were completed:

- The Consumer **accepts** the T&C.
- The Consumer **uploads** the signed T&C document.
- The Energy Community/Manager or Stemy **verifies** that the document is correct.

3. Stemy must create a solution. User has signed T&C, 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, phone number, contracted tariff and power, etc.
 - **Comments section:** This allows establishing communications between the Manager and Stemy.
 - **Check survey answers:** From this button, the Manager can directly check the Plan Survey answers with no need to move screens.
 - **Check user photos:** informative photos of the Consumer energy characteristics
 - **Solution section:** check the specific solution for the Consumer, assign Installers, etc.
 - **The delete user button** moves the Consumer to the "Leaving Consumers" page in case the Consumer will no longer participate in the Plan.
- Button C is a new feature that has been included in this section for Energy Communities/Managers to filter Consumers by who is responsible for the pending action: the Manager, Consumer, Installer or Stemy. This way, they can quickly access the actions they need to perform for the process to continue.

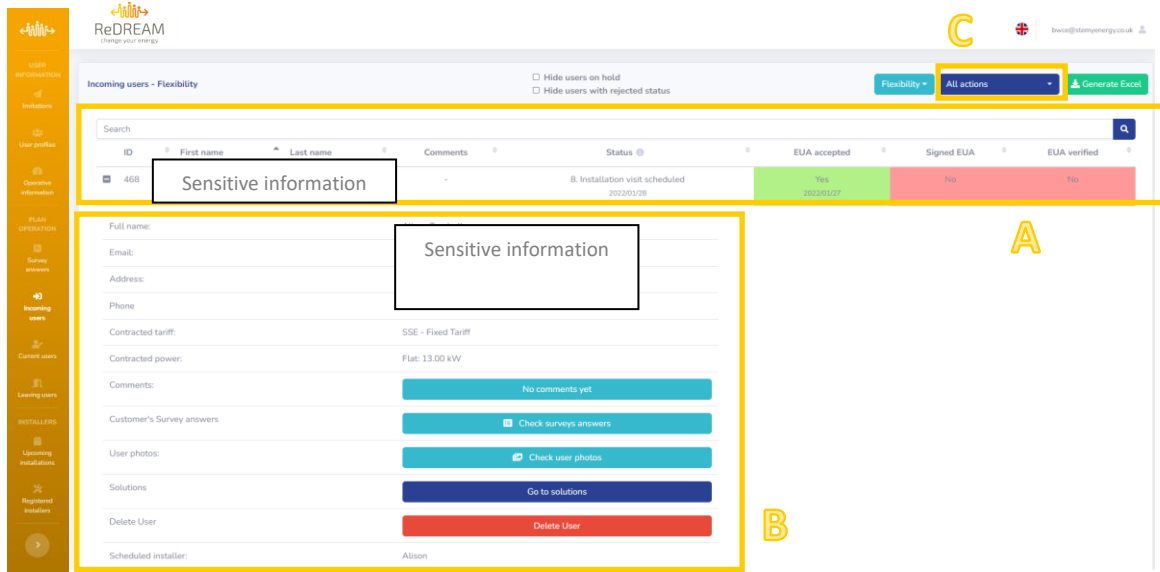


Figure 20 Manager: Incoming consumers

3.2.5. Leaving User

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

This screen is like 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.

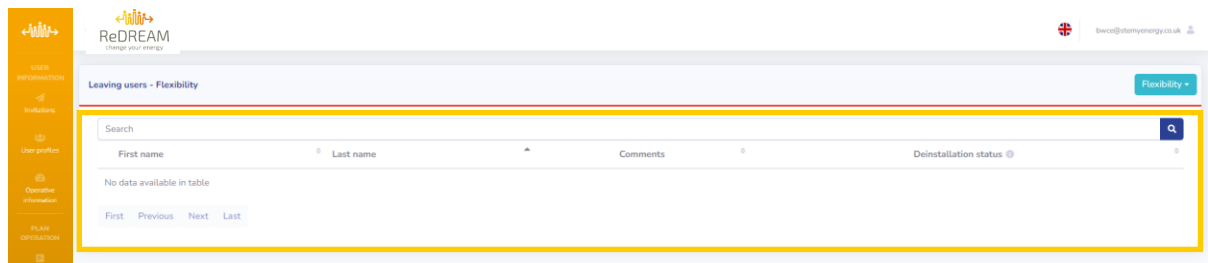


Figure 21 Manager: Leaving Consumers

3.2.6. Invitations

The Energy Community/Manager can send out invitations to join REDREAM through this section.

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.

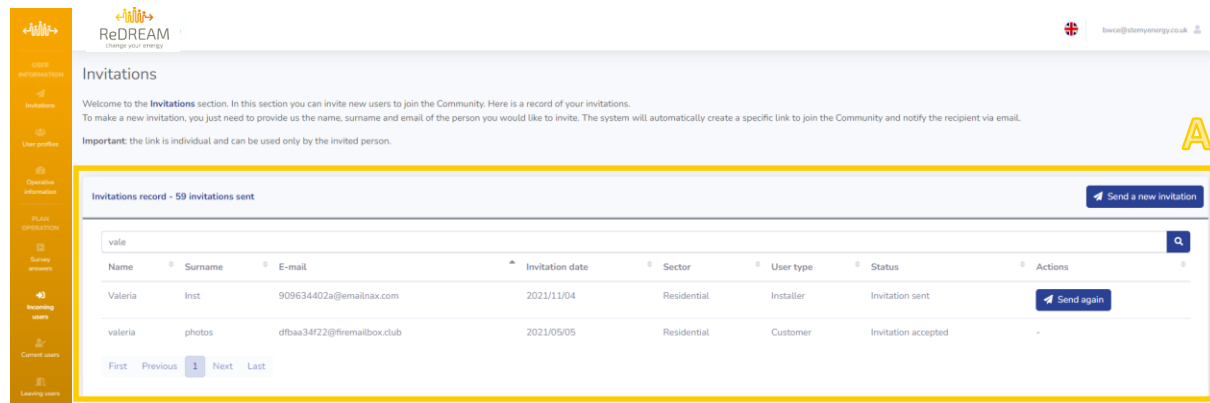


Figure 22 Manager: Invitations

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 of the installer, e.g. name of the Consumer, phone number, address, etc. The following image shows an example of an installation appointment:

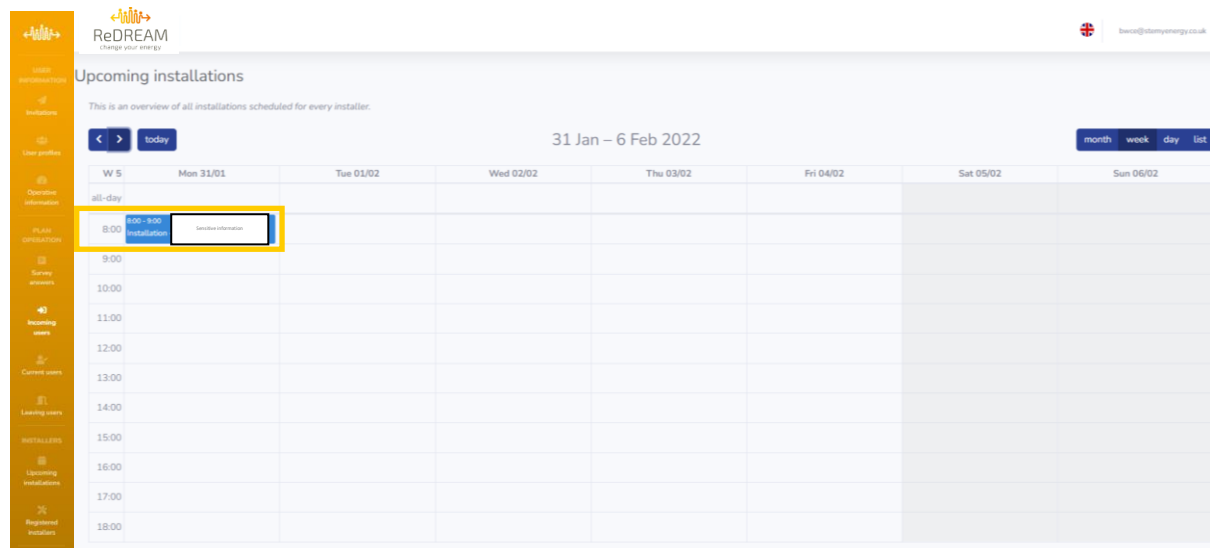


Figure 23 Manager: Upcoming Installations to be developed

3.2.8. Registered Installers

In this section, 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 can be differentiated in this screen:

- 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.
 - In this new version, the Energy Community and/or Manager is now able to access the Installer's Portal.

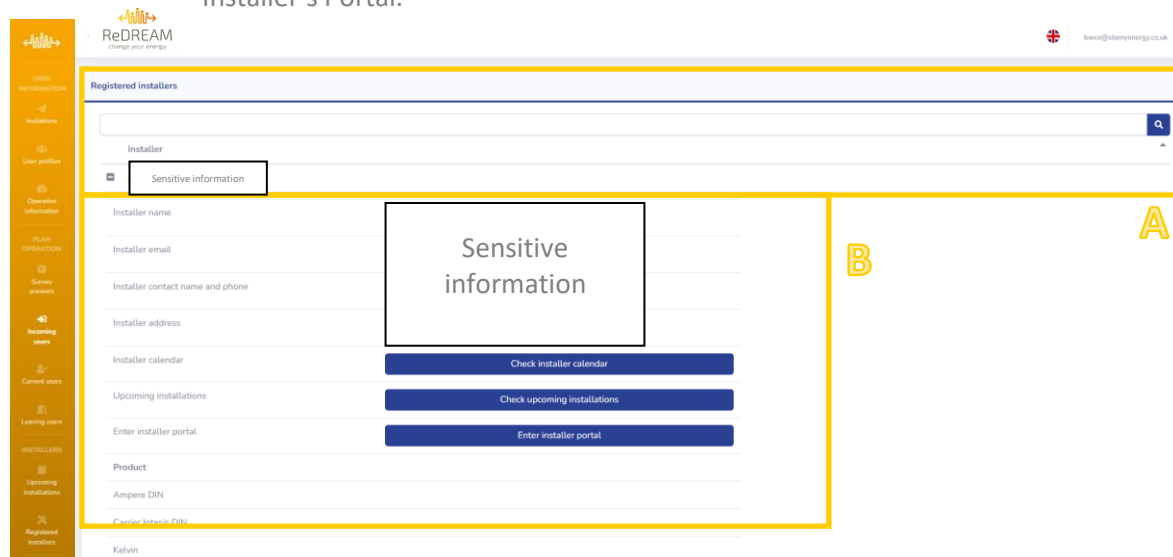


Figure 24 Manager: Registered Installers to be developed

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.

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.

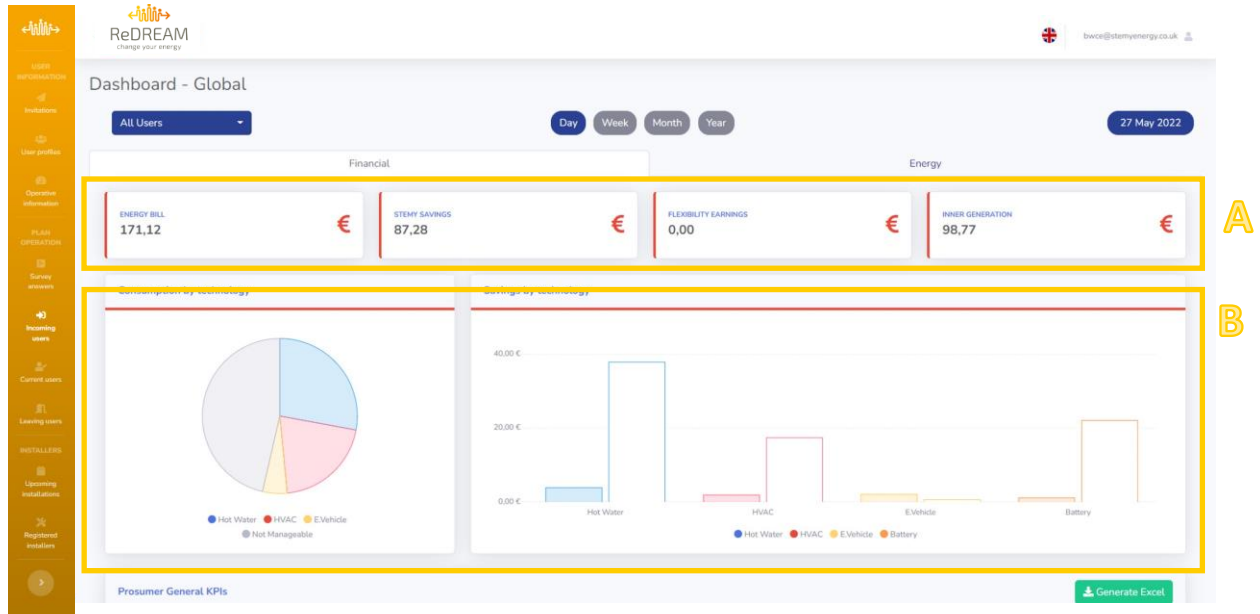
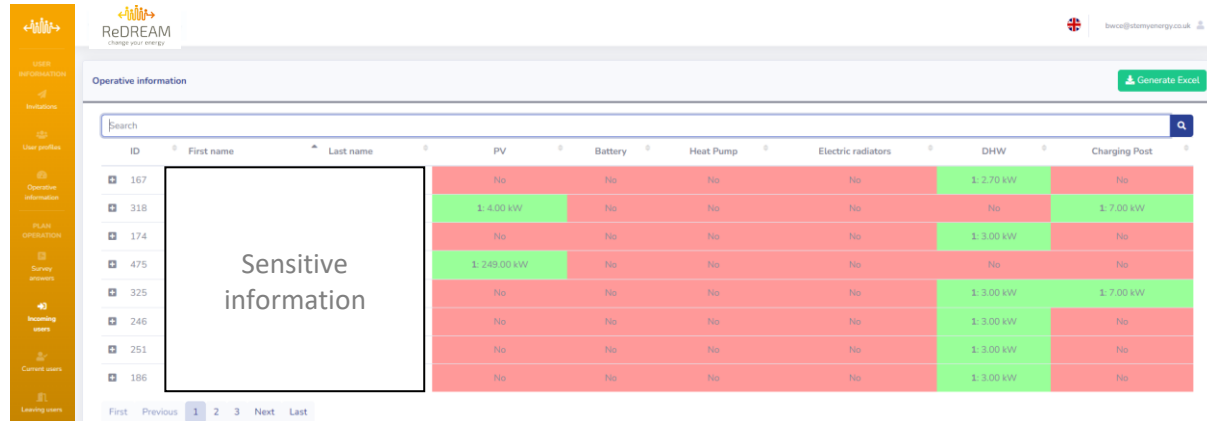


Figure 25 Manager: Dashboard of KPIs

3.2.10. Operative Information

Operative Information is a new section which displays a table where you can see the different types of devices each Consumer has installed. In addition, it also provides the power of the different devices filtered by their technology.



ID	First name	Last name	PV	Battery	Heat Pump	Electric radiators	DHW	Charging Post
167			No	No	No	No	1.270 kW	No
318			1.400 kW	No	No	No	No	1.700 kW
174			No	No	No	No	1.300 kW	No
475			1.249.00 kW	No	No	No	No	No
325			No	No	No	No	1.300 kW	1.700 kW
246			No	No	No	No	1.300 kW	No
251			No	No	No	No	1.300 kW	No
186			No	No	No	No	1.300 kW	No

Figure 26 Manager: Operative Information

3.3. Installer Portal

Installers have access to their own Portal, which is different from the one for the Energy Community/Manager and the Consumer Portal. The Portal allows Installers to 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 below:

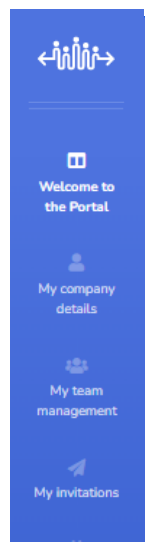
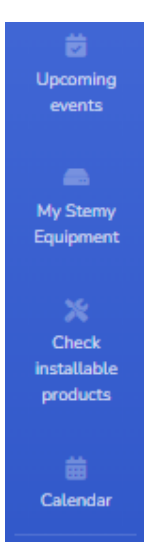
	<p>Welcome to the Portal: general overview of the actions and steps to be taken by the Installer along the installation process.</p> <p>My company details: information about the company.</p> <p>My team management: it organizes the installer team in categories to simplify and enable a better organization.</p> <p>My invitations: it enables the invitation of new participants.</p>		<p>Upcoming events: manage actions and steps with Consumers.</p> <p>My Stemy Equipment: it serves as a stock for Stemy Devices and to register received Equipment.</p> <p>Check installable products: list of all the products they are allowed to install.</p> <p>Calendar: it shows the different scheduled appointments.</p>
---	---	---	---

Figure 27 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 client, 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.

This screen 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. This section has been updated, offering a more simplified explanation of the different steps to follow, which are represented in chronological order of actions.
- Section B provides some tips to navigate through the Portal and contact details for Installers to solve any questions that may arise.

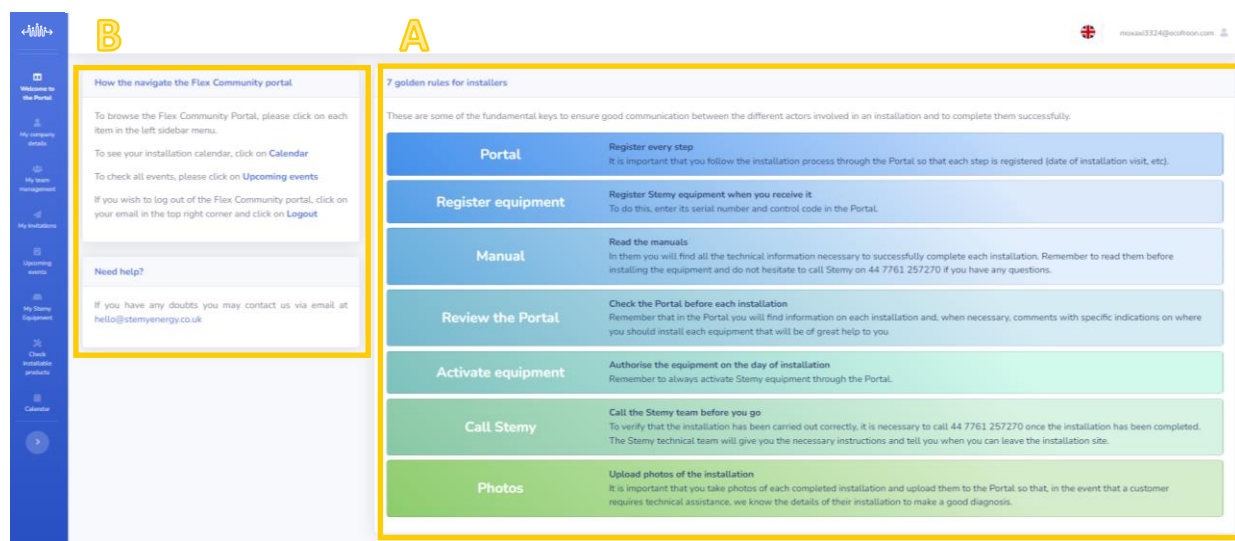


Figure 28 Installer: Welcome to the Portal

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 the image below, this section includes a map so that the Installer can provide their address, making the registration process easier and more interactive:

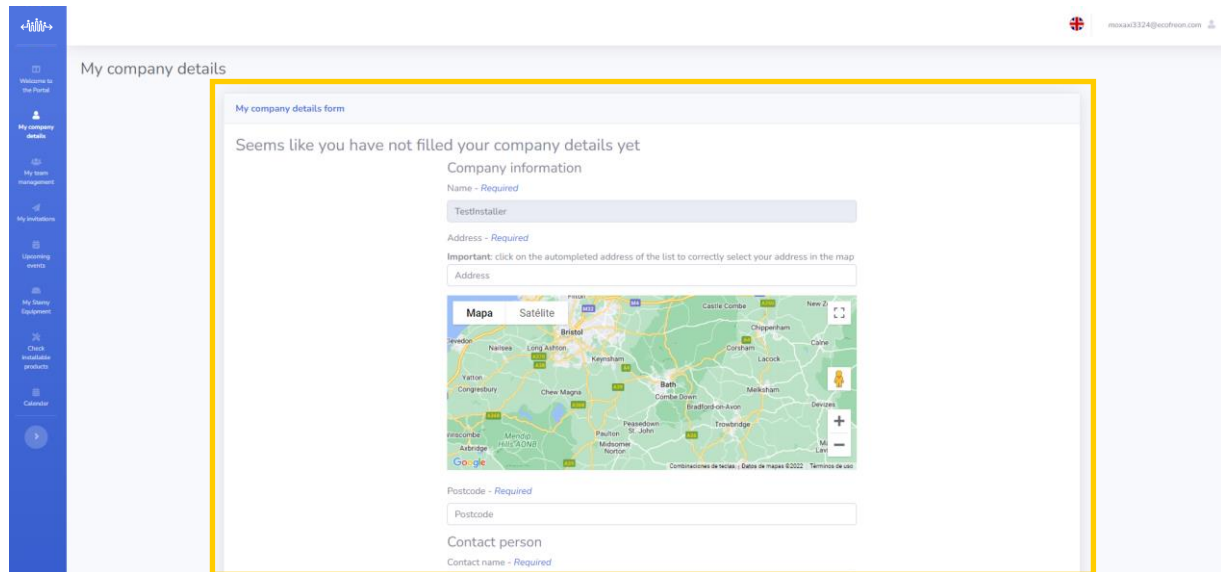


Figure 29 Installer: My company details

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.

My team management page can be split into two different 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, that only the “Administration Installer” will be able to manage this section.

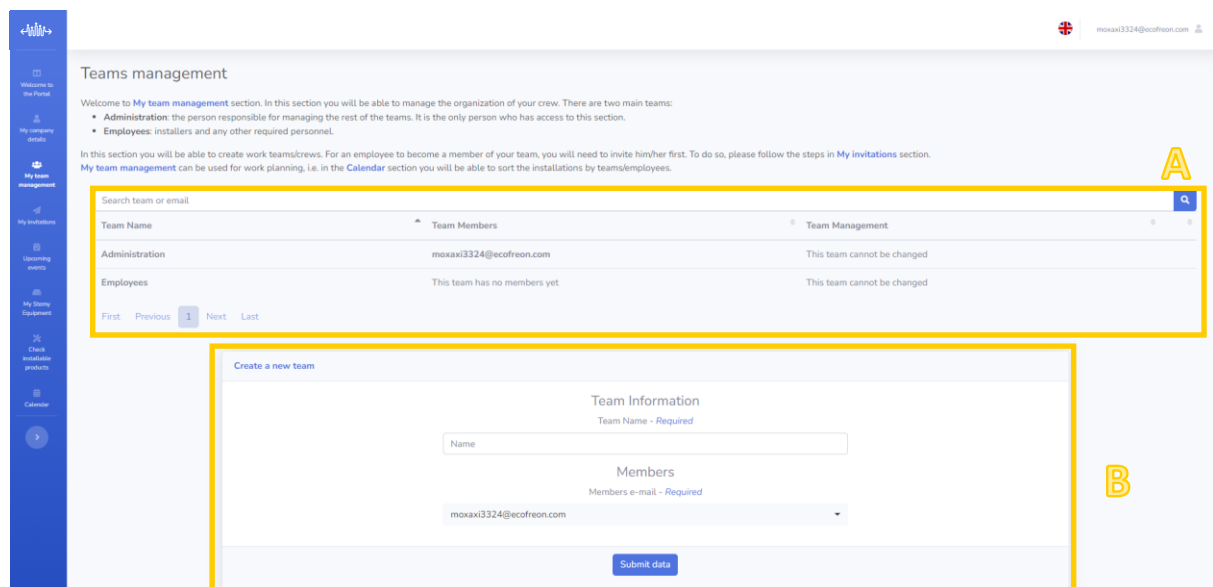


Figure 30 Installer: My team management

3.3.4. My invitations

My invitations section is also available for Installers. 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 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.

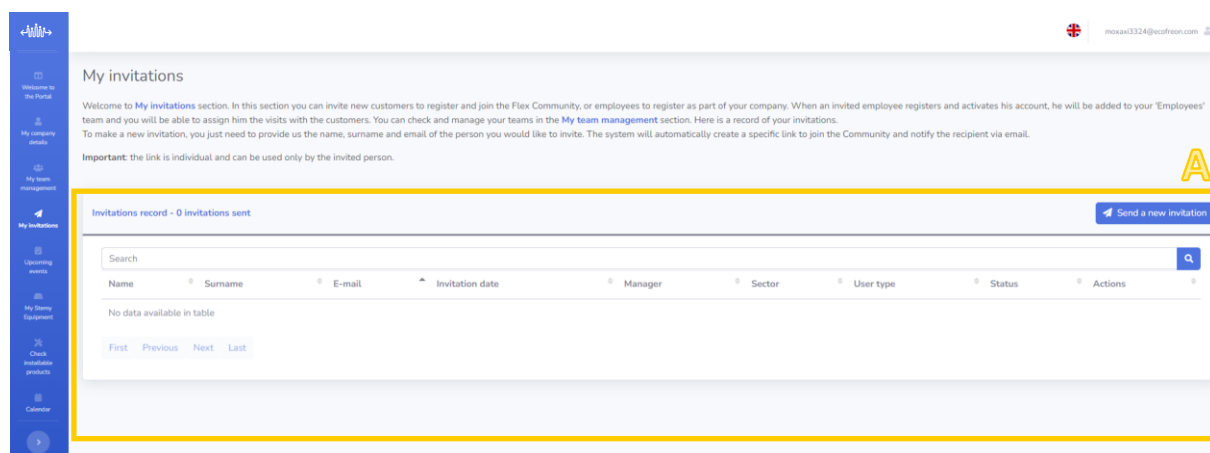


Figure 31 Installer: My invitations

3.3.5. Upcoming events

The **Upcoming events** section is the main section where 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 for managing the scheduling of visits, providing Installers with the contact details of each Consumer.

The **Upcoming events** page is shown below.

It can be divided into two areas:

- Section A: The general overview of each Consumer and their Consumer Status (shown in yellow). Installers can filter their upcoming events by Status, which will make the management of installations easier.
- 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 shows the 'Upcoming events' section of the installer portal. A table lists two events, both with a status of 'Installation visit closed'. A yellow box highlights the table and a detailed view of the first event. The detailed view includes several action buttons:

Details	Customer Name	Phone	Address	Product	Date	Status
	Sarah Smith	+44 121 234 5678	Rome, Roma, Italia BS2 0PS	1 unit of Ampere DIN 1 unit of Ampere Sensor Mono 40A 2U	Tuesday, 7th December - 08:00	Installation visit closed
	cuatro mayo	+44 121 234 5678	Perejiles river, España 23004	1 unit of Ampere DIN 2 units of Waddy F	Wednesday, 11th May - 09:00	Installation visit closed

The detailed view for the first event includes the following actions:

- 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
- Upload installation photos: Upload installation photos

Figure 32 Installer: Upcoming events to be developed

3.3.6. My Stemy Equipment

ReDREAM equipment from third parties will be managed using their own installation procedure or apps. In the case of installing any prototype from Stemy Installers need to use this section. **My Stemy Equipment** section is used by Installers to register and manage Stemy Equipment stock.

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 on 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.

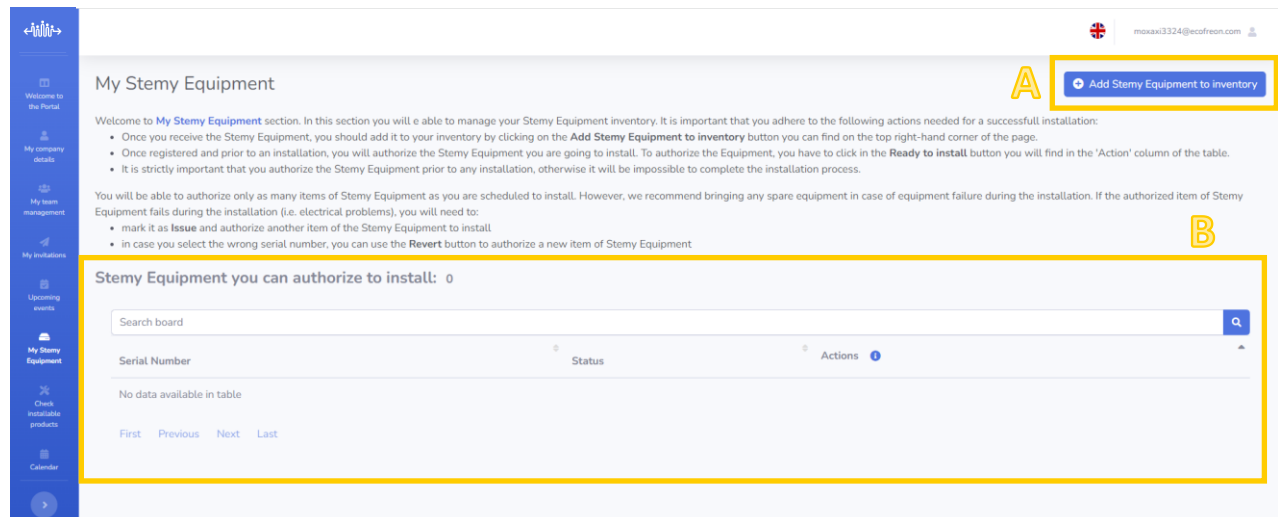


Figure 33 Installer: My Stemy Equipment to be developed

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 shown in section A below.

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.

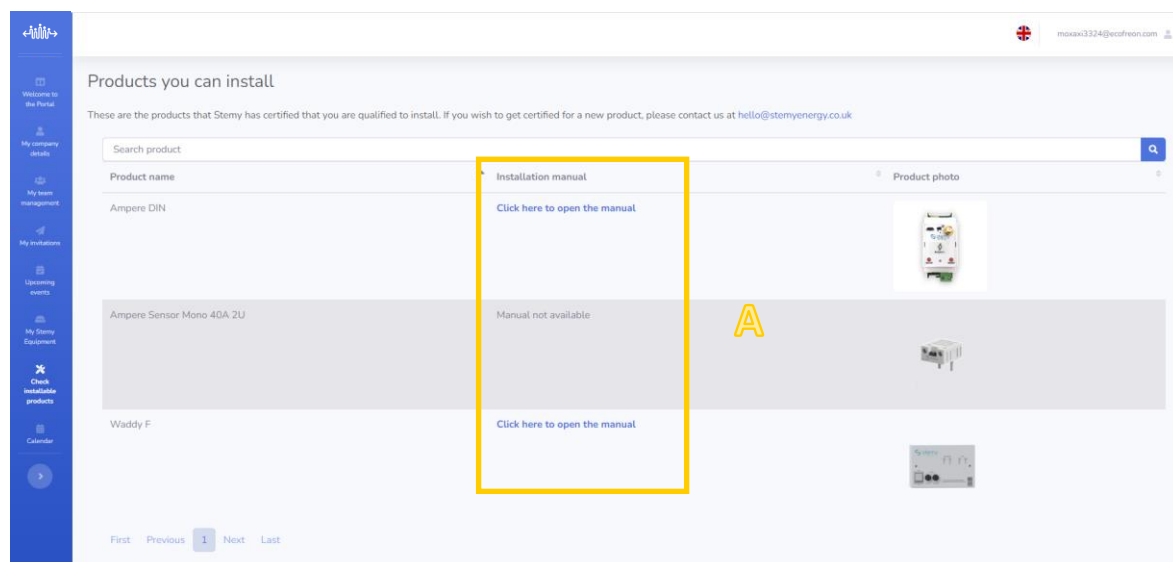


Figure 34 Installer: Check installable products to be developed

3.3.8. Calendar

The **Calendar** section provides Installers with an overview of all visits scheduled with each Consumer (section A in the image below).

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).

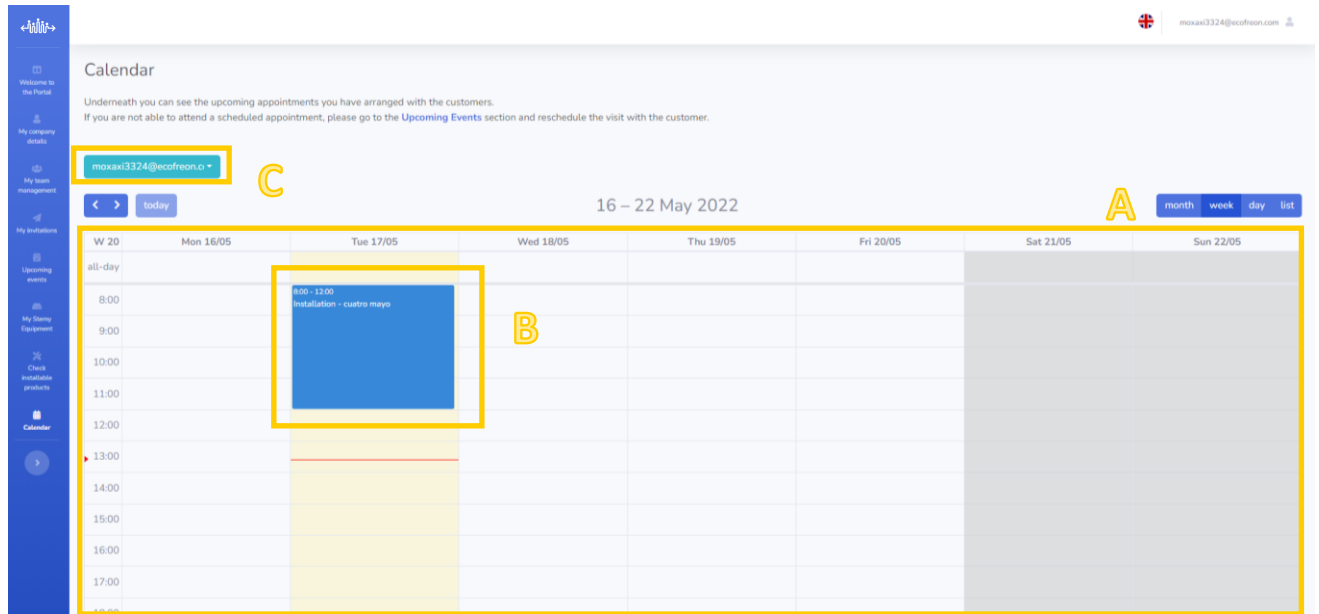


Figure 35 Installer: Calendar to be developed

4. Journey of the main agents in the Consumer Portal

This section will explain which are the main figures that can use the Consumer Portal, 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 and Consumer Portal: Stemy (as Aggregator), the Energy Community or Manager, the Consumer, and the Installer. The installation process can be summarised in 17 steps, as shown in Figure 36:



Figure 36 Global Consumer Portal Journey

- **STEP 1:** The Manager invites a new Consumer.
- **STEP 2:** The Consumer registers in ReDREAM.
- **STEP 3:** The Consumer fills in the information required to complete their Profile.
- **STEP 4:** Download the ReDREAM App
- **STEP 5:** The Consumer can use the ReDREAM App with basic functionalities such as mobility and social network.

If they want more control of the energy, they need to install devices for existing Equipment or new Equipment with devices. This is done thanks to the plans. The forecasted plans with the Services that unlock, the KPIs affected, and the DEMOS that are affected by them are gathered in Table 2. DEMOS can decide which plans are shown to the users of their Demo.

Table 2 Forecasted Plans in ReDREAM

REDREAM PLAN*	REDREAM SERVICE	KPI affected	Type of KPI	Demos
Just signed up (No Plan Requested)	1A. Non-Energy: comfort 1B. Non-Energy: mobility 1C. Non-Energy: social network	No. of users, No. of users of social network, No. of interactions	Social KPIs	ALL
Gamification Plan	1+ (2. Energy Gamification)	No. of users, No. of users of social network, No. of interactions, DR (implicit), No of consumers (if SM data is available)	Social and economic impact	ALL
Community solar Plan	1+ (3A. Energy efficiency + 3B. Advisory tool)	No. of users, No. of users of social network, No. of interactions, DR (implicit), No of consumers , RES, uptake services, impact 5,15,16, predictability	Social, economic and environmental impact	ALL
Flexibility plan (for existing equipment)	1+3	No. of users, No. of users of social network, No. of interactions, No. of consumers, RES, Uptake of services, Impact 5 target, Implicit DR, Increased predictability, Impact 13 and 14, For those with PVs also impact 15 and 16	Social and economic impact	ALL
	1+3+(4. EDR service)	No. of users, No. of users of social network, No. of interactions, No. of consumers, RES, Uptake of services, Impact 5 target, Explicit DR, Implicit DR, Increased predictability, Impact 13 and 14, For those with PVs also impact 15 and 16		SP & UK
Technology Plan (new equipment - EV, PV, HP) + Flexibility plan (for existing equipment)	1+3+(4. EDR service)	No. of users, No. of users of the social network, No. of interactions, No. of consumers, RES, Uptake of services, Impact 5 target, Explicit DR, Implicit DR, Increased predictability, Impact 13 and 14, For those with PVs also impact 15 and 16	Social and economic impact	SP & UK

* Name could change

- **STEP 6:** The Consumer requests a Plan by completing its specific survey.
- **STEP 7:** Stemy Energy and the Manager assess the Consumer's suitability to join the Plan.
 - **STEP 7.1:** *Only for Flexibility Plans*-The Consumer completes the Survey Design Survey.
- **STEP 8:** Stemy Energy and the Manager approves the Consumer to join the Plan.
- **STEP 9:** The Consumer signs the Terms & Conditions on the Portal to continue with the process and uploads a signed copy.
- **STEP 10:** The Manager or Stemy Energy verifies the correct signature of the T&Cs.
- **STEP 11:** Stemy Energy creates a personalised solution for the Consumer.
- **STEP 12:** The Manager assigns Installers.
- **STEP 13:** The Installer uploads the quote for the installation.
- **STEP 14:** The Manager chooses a quote.
- **STEP 15:** The Installer agrees on an installation date with the Consumer and registers it in the Portal.
- **STEP 16:** The installation takes place.
- **STEP 17:** The Consumer can use the App with a new device, and it may unlock new services depending on the plan completed.

Some changes could occur during the next months to improve consumer engagement. For instance, the app step can be delayed after requesting a plan to deal with the awaiting stages.

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 37.



Figure 37 Consumer Journey

- **STEP 1:** Register in the Portal.
- **STEP 2:** Fill in the information required to complete their Profile.
- **STEP 3 (Optional):** In the case of an existing compatible smart meter. Allow access to data from it to obtain the global consumption of the house.
- **STEP 4:** Request a Plan by completing its specific survey as described before.
- **STEP 5:** Sign and upload the Terms & Conditions on the Portal.
- **STEP 6:** Schedule the installation visit.

4.1.1. Sign up

Registering in 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.

- 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.

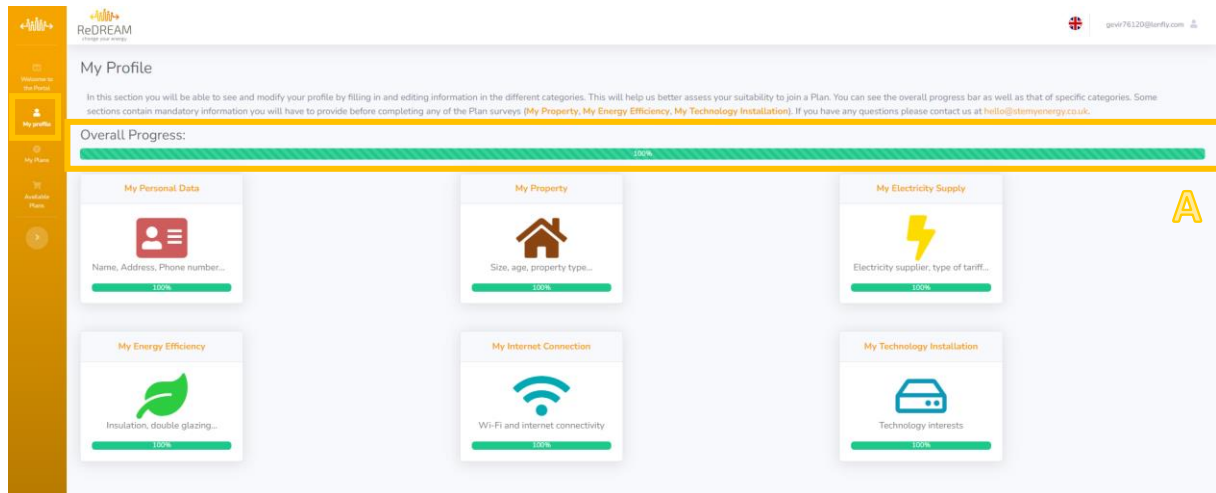


Figure 38 Consumer Journey: Complete your Profile

4.1.3. Request a Plan

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

For the Flexibility Plan, the Consumer will be required to complete two different surveys. The first one is focused on assessing Consumer technologies and their compatibility with Devices and ReDREAM Intelligence. Then, the Solution Design Survey, asks for the more detailed question about the already preselected Consumer technologies to design the best solution. The process of completing this second survey will be the same as before. All necessary buttons and steps will be explained and carried out in the My Plan section.



Figure 39 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, and 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.

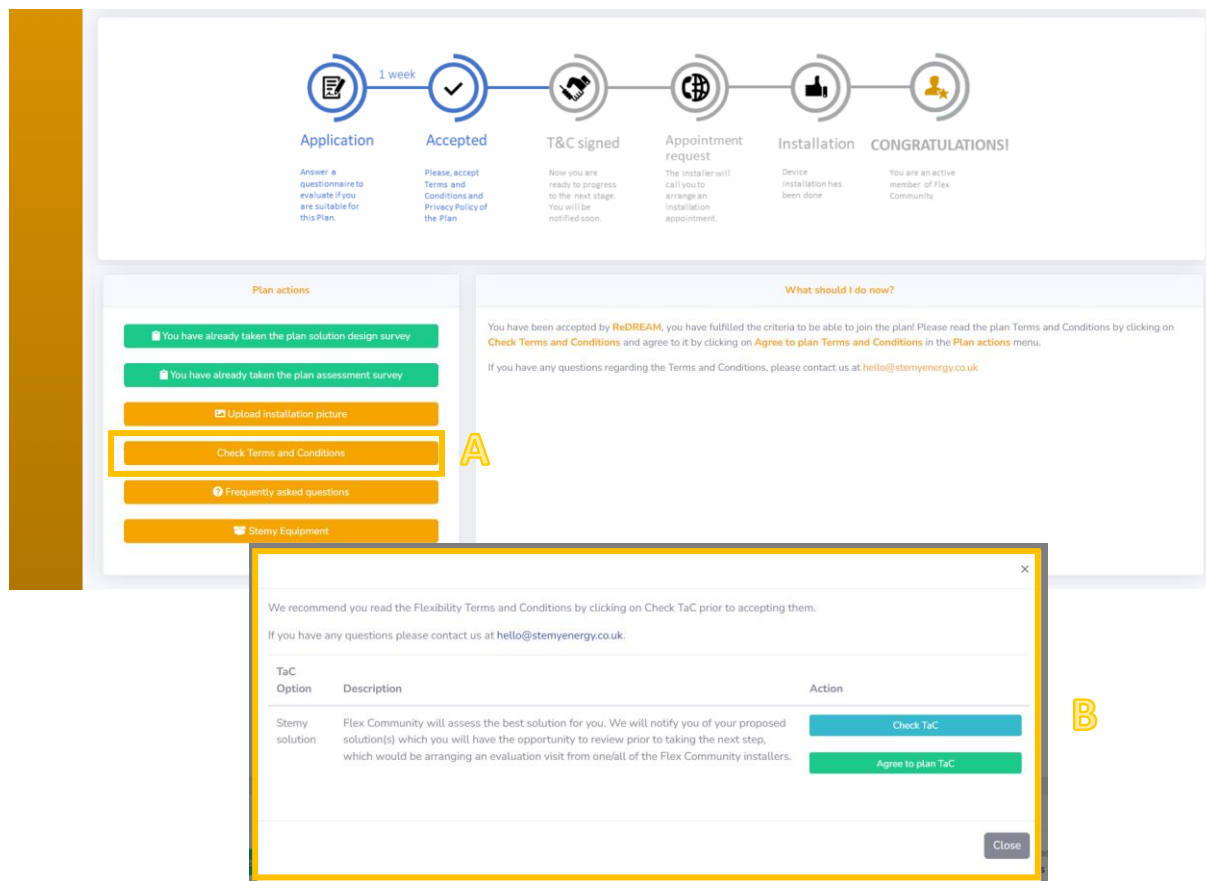
4.1.4. Sign T&Cs

Once the Consumer has been approved to join a Plan, they will be asked to sign the **Terms and Conditions**. An email is sent.

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.

In addition, Consumers will have to upload a signed copy of the Terms and Conditions into the Portal.



Application
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 solution design survey
- You have already taken the plan assessment survey
- Upload installation picture
- Check Terms and Conditions** (A)
- Frequently asked questions
- Starry Equipment

What should I do now?

You have been accepted by ReDREAM, you have fulfilled the criteria to be able to join the plan! Please read the plan Terms and Conditions by clicking on **Check Terms and Conditions** and agree to it by clicking on **Agree to plan Terms and Conditions** in the **Plan actions** menu.

If you have any questions regarding the Terms and Conditions, please contact us at hello@stemyenergy.co.uk

We recommend you read the Flexibility Terms and Conditions by clicking on Check TaC prior to accepting them.

If you have any questions please contact us at hello@stemyenergy.co.uk.

TaC Option	Description	Action
Starry solution	Flex Community will assess the best solution for you. We will notify you of your proposed solution[s] which you will have the opportunity to review prior to taking the next step, which would be arranging an evaluation visit from one/all of the Flex Community installers.	<input type="button" value="Check TaC"/> <input type="button" value="Agree to plan TaC"/>

Close

Figure 40 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.

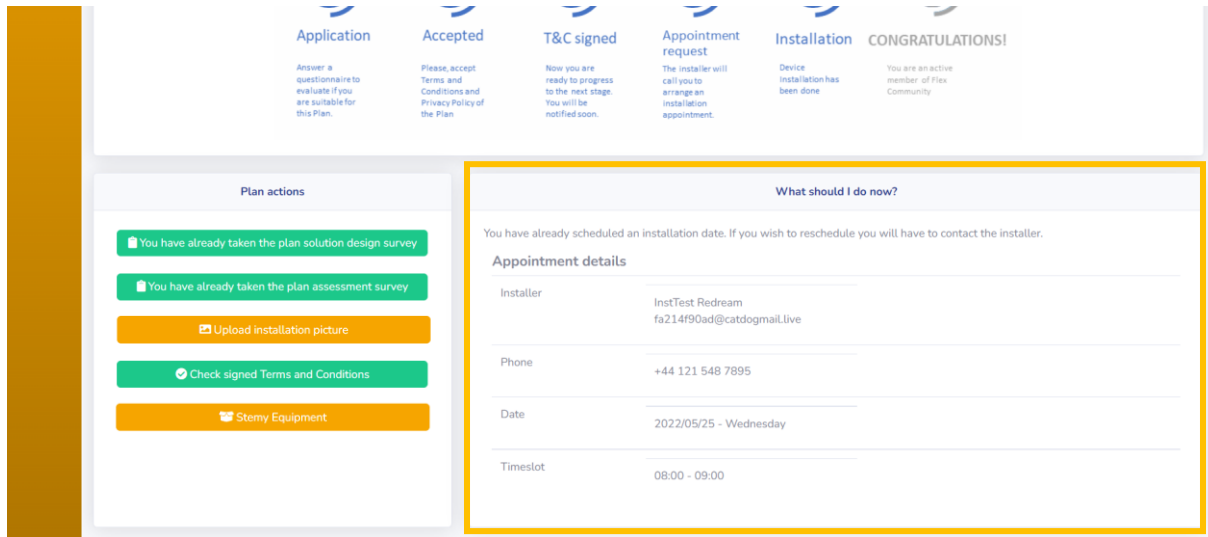


Figure 41 Consumer Journey: Installation Visit

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 42:



Figure 42 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.

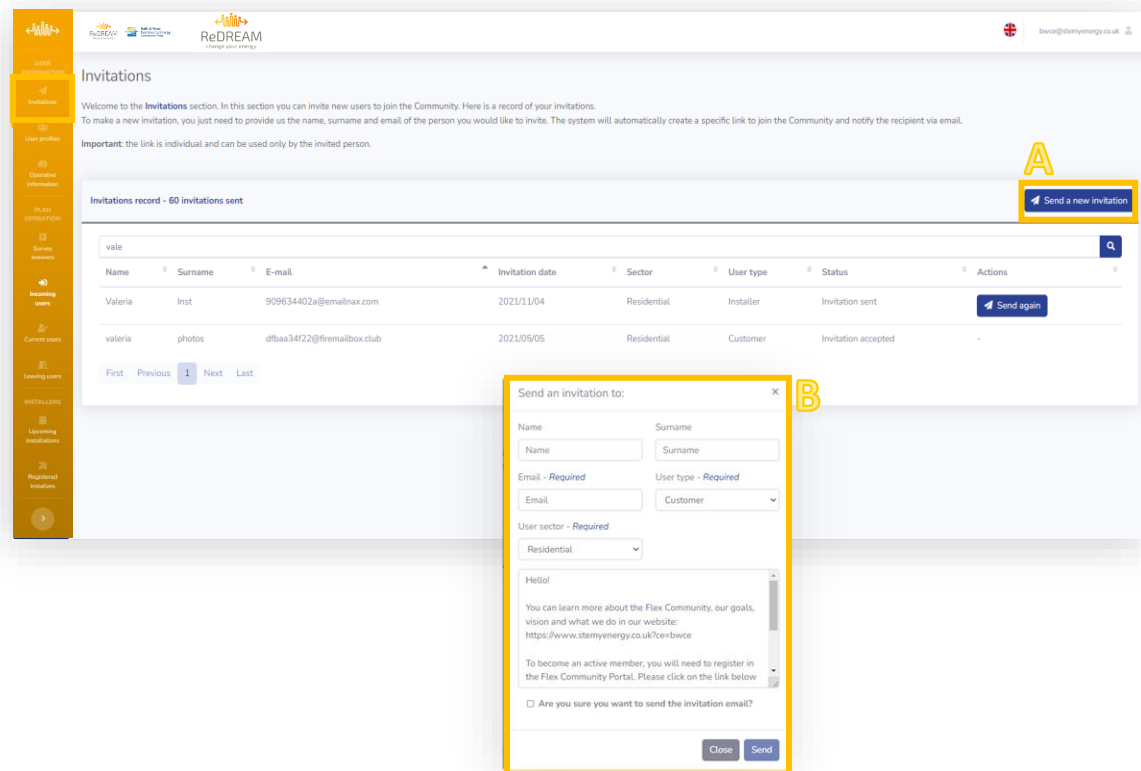


Figure 43 Manager's Journey: Invitation to Access

- **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:** Verify T&Cs
- **STEP 7:** Assign the Installers for the different Customer solutions.
- **STEP 8:** Choose the quote of preference.
- **STEP 9:** 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, as ReDREAM partner in charge of the security, with an email account. This account will be used for the portal login and to receive, manage, and follow up on all communications.

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

- flex@companyname.com

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

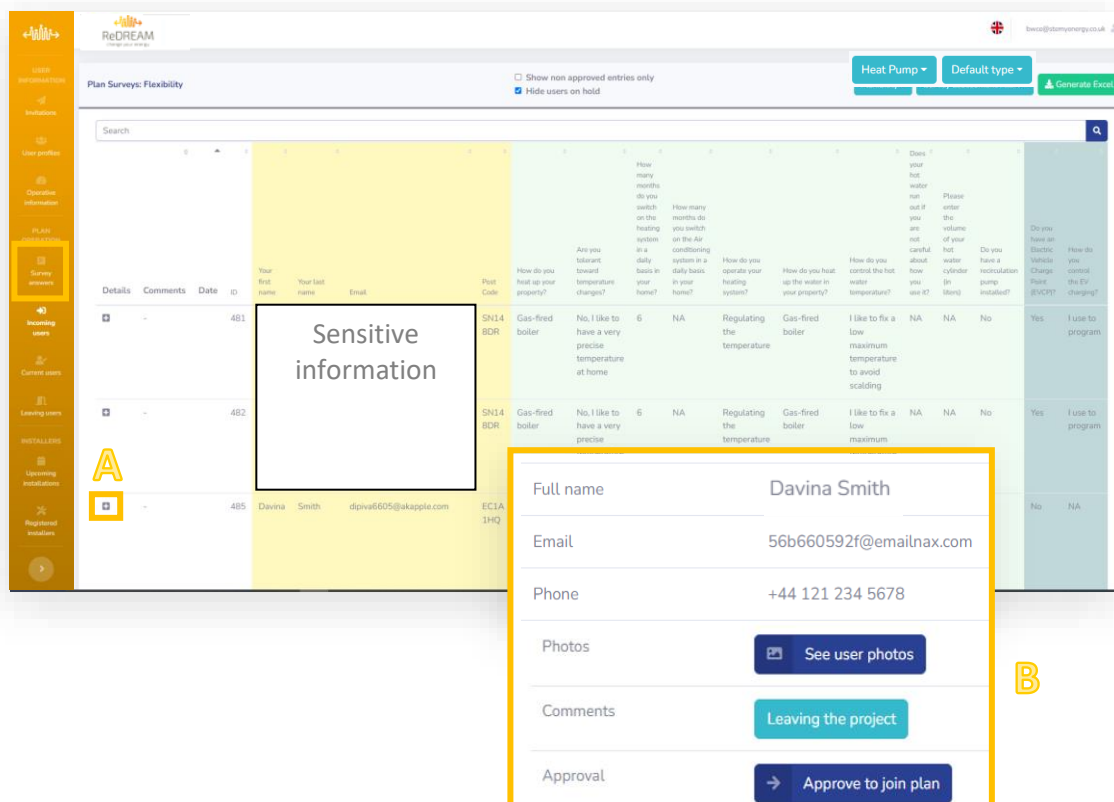
Any member of the Portal needs prior authorisation or invitation to register in the Portal. The Energy Community/Manager can manage these in the 3.2.6 Invitations section.

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

4.2.3. Suitability Assessment (Steps 2,3 & 4)

The Energy Community/Manager can assess Consumer suitability by reviewing the Consumer's Profile and Plan Surveys. Therefore, the Suitability Assessment involves the following steps:

- The Energy Community/Manager needs to check the Consumer's answers to the 3.1.2 My profile section in the 3.2.2 User profile section.
- Then, the Energy Community/Manager will 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)
 - Please, bear in mind that for the Flex Plan, the Suitability Assessment consists of two different questionnaires. Therefore, the Energy Community/Manager will have to review two different surveys before approving the Consumer to join the Plan: "Assessment Survey" and "Solution Design Survey".
- If, after reviewing all the information, they decide that the Consumer is **suitable**, he/she will be **approved to join the Plan** in the blue button shown below (for a maximum of a week). (B)



The screenshot displays the ReDREAM web application interface. The left sidebar contains navigation options, with 'Survey answers' highlighted by a yellow box labeled 'A'. The main content area shows a table of user profiles. The first row is partially obscured by a white box labeled 'Sensitive information'. The second row shows a user profile for Davina Smith (ID 485) with a yellow box around the user icon. A modal window is open over this profile, showing user details and a 'Leaving the project' button. A yellow box labeled 'B' highlights the 'Approve to join plan' button in the modal's approval section.

Details	Comments	Date	ID	Your first name	Your last name	Email	Post Code	How do you heat up your property?	Are you tolerant toward temperature changes?	No, I like to have a very precise temperature at home	6	NA	Regulating the temperature	Gas-fired boiler	I like to fix a low maximum temperature to avoid scalding	NA	NA	No	Yes	I use to program	
				Sensitive information				SN14 RDR	Gas-fired boiler	No, I like to have a very precise temperature at home	6	NA	Regulating the temperature	Gas-fired boiler	I like to fix a low maximum temperature to avoid scalding	NA	NA	No	Yes	I use to program	
				Sensitive information				SN14 RDR	Gas-fired boiler	No, I like to have a very precise temperature at home	6	NA	Regulating the temperature	Gas-fired boiler	I like to fix a low maximum temperature to avoid scalding	NA	NA	No	Yes	I use to program	
				Sensitive information				EC1A 1HQ	Gas-fired boiler	No, I like to have a very precise temperature at home	6	NA	Regulating the temperature	Gas-fired boiler	I like to fix a low maximum temperature to avoid scalding	NA	NA	No	No	NA	NA

Full name Davina Smith

Email 56b660592f@emailnax.com

Phone +44 121 234 5678

Photos [See user photos](#)

Comments [Leaving the project](#)

Approval [Approve to join plan](#)

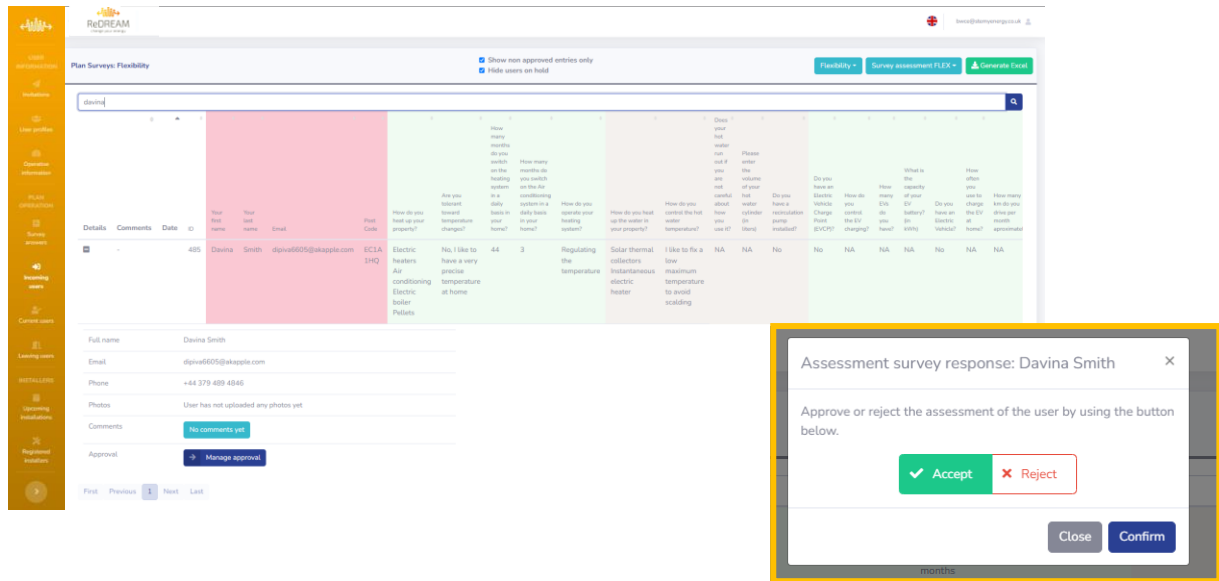


Figure 44 Manager’s Journey: Suitability Assessment

4.2.4. Creating a solution

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

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 and select the desired Consumer. By clicking on ‘Solutions’, they will find a button (A) that will allow the selection of the Installer they want to assign to the Consumer.

Please, bear in mind the selected Installer must be authorised to install the Equipment detailed in the solution he is being assigned for.

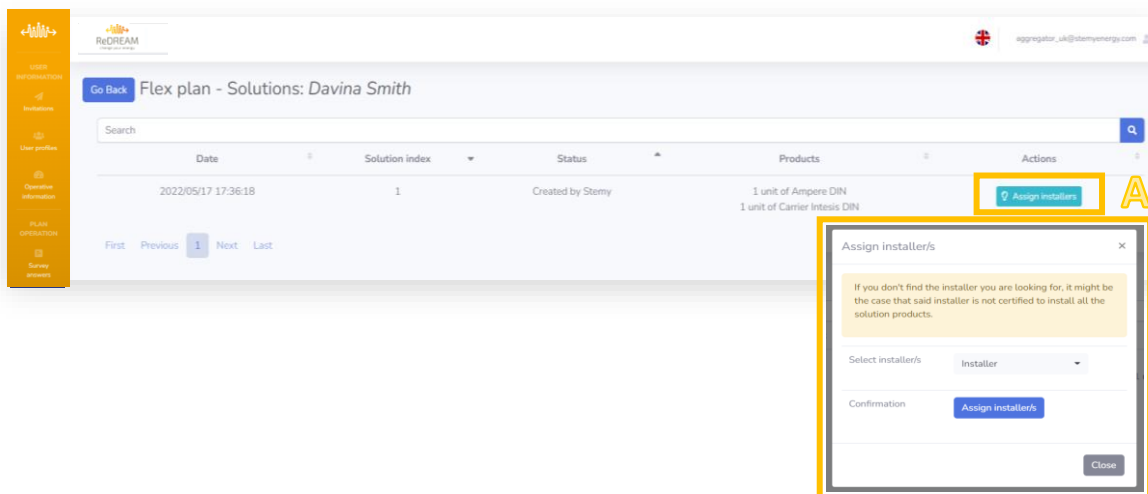


Figure 45 Manager’s Journey: Assigning installers

4.2.6. Quote Acceptance

Quotes **will be accepted** or rejected by the Energy Community/Manager and/or Stemy for Stemy Prototypes. In the case of Third-Party Plans (EVCP; PV, etc.), the Energy Community/Manager will review if it is correct and reasonable before they are visible to the Consumer. Rimond and NTUA will also help the Energy Community/Manager with the smart meter or humidity sensors need it for some of the non-energy services

For Flexibility Plans, if more than one Installer was assigned, the Energy Community/Manager and/or Stemy would choose the quote of its preference. In the case of Third-Party Plans, quotes will be sent to the Consumer for him to choose from.

To select a quote, they must go to 3.2.4 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.

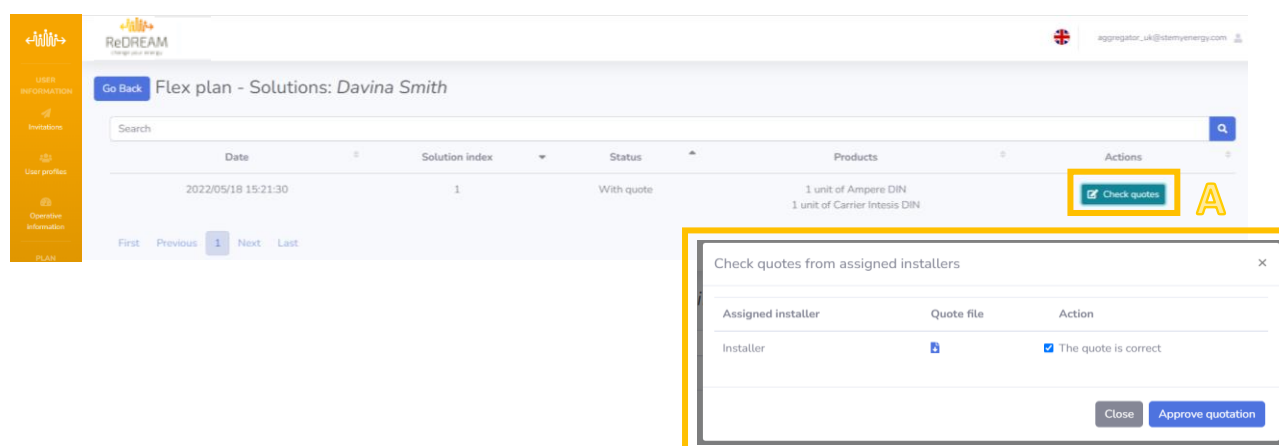


Figure 46 Manager's Journey: Quote Acceptance

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 User section to the Current User.

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. **Removal:** if the Customer decides to leave the Plan, the installed Equipment and Devices should be uninstalled.
3. **Maintenance services:** it may be the case that the installed Equipment requires replacement or maintenance services. Customer support will be taken by the ReDREAM App, where the contact of the DEMO leader is provided.

In all these scenarios, the Plan will be re-opened, starting on step 3.2.5 "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 following figure:



Figure 47 Installer's Journey

- **STEP 0:** A new Consumer enters the Portal.
- **STEP 1:** Review Consumer information to prepare the quote.
- **STEP 2:** Prepare the quote and upload it to the Portal.
- **STEP 3:** Once received, register Stemy Equipment in the Portal. Third-party Equipment does not need this step.
- **STEP 4:** Call the Consumer to schedule an installation visit.
- **STEP 5:** *Day of Installation-Activate the Stemy 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 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 and, in some cases, 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 previously described.

4.3.2. New Consumer

Once Installers have registered in the 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.

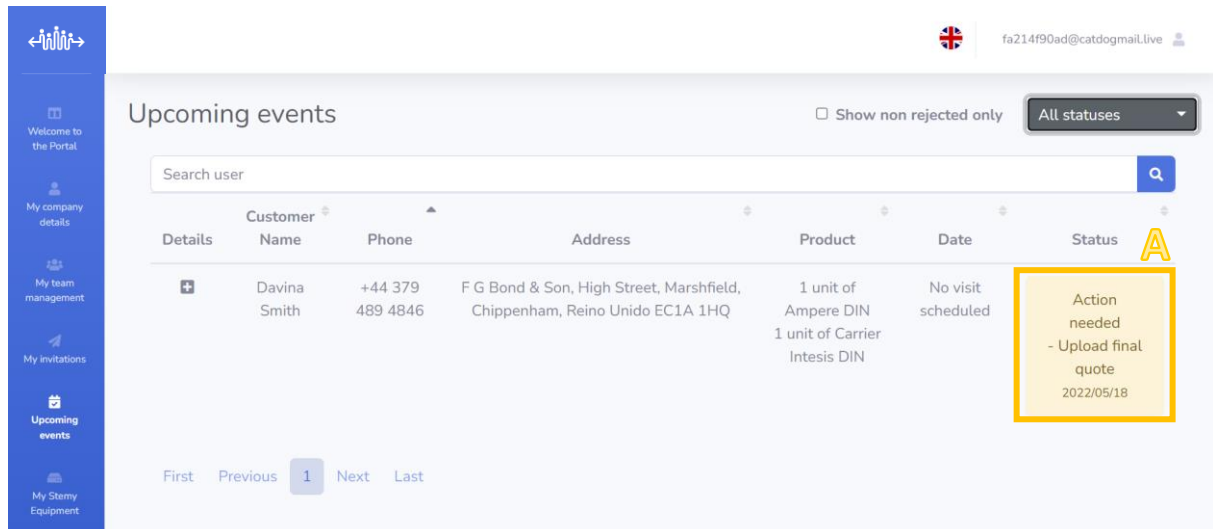


Figure 48 Installer's Journey: New Consumer

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 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.). (A)

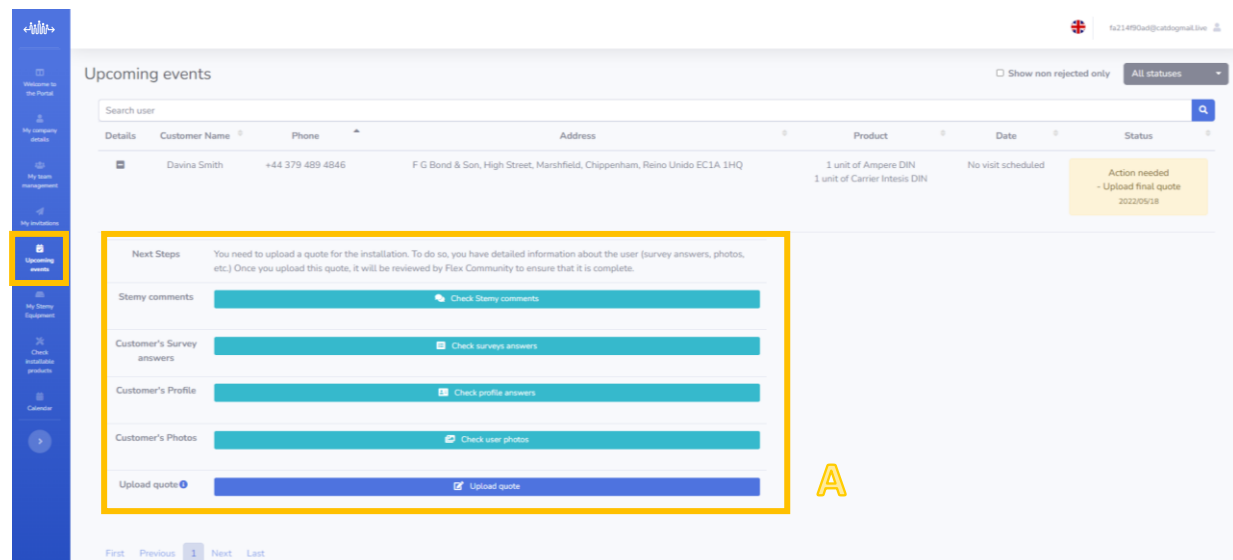


Figure 49 Installer's Journey: Consumer Information

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:

The screenshot displays a user interface for an installer. At the top, customer information is shown: Davina Smith, phone number +44 379 489 4846, address F G Bond & Son, High Street, Marshfield, Chippenham, Reino Unido EC1A 1HQ, and equipment details: 1 unit of Ampere DIN and 1 unit of Carrier Intesis DIN. Below this is a 'Next Steps' section with a text instruction: '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.' Underneath are five action buttons: 'Check Stemy comments', 'Check surveys answers', 'Check profile answers', 'Check user photos', and 'Upload quote'. The 'Upload quote' button is highlighted with a yellow box. An inset window titled 'Add new file' is also shown, providing instructions on how to prepare a quote (hourly rate vs. final cost) and a 'Choose file' button.

Figure 50 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. 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:

1. Individually **register the Stemy Equipment (B)**:
 - a. Serial Number
 - b. Control Code
2. 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.

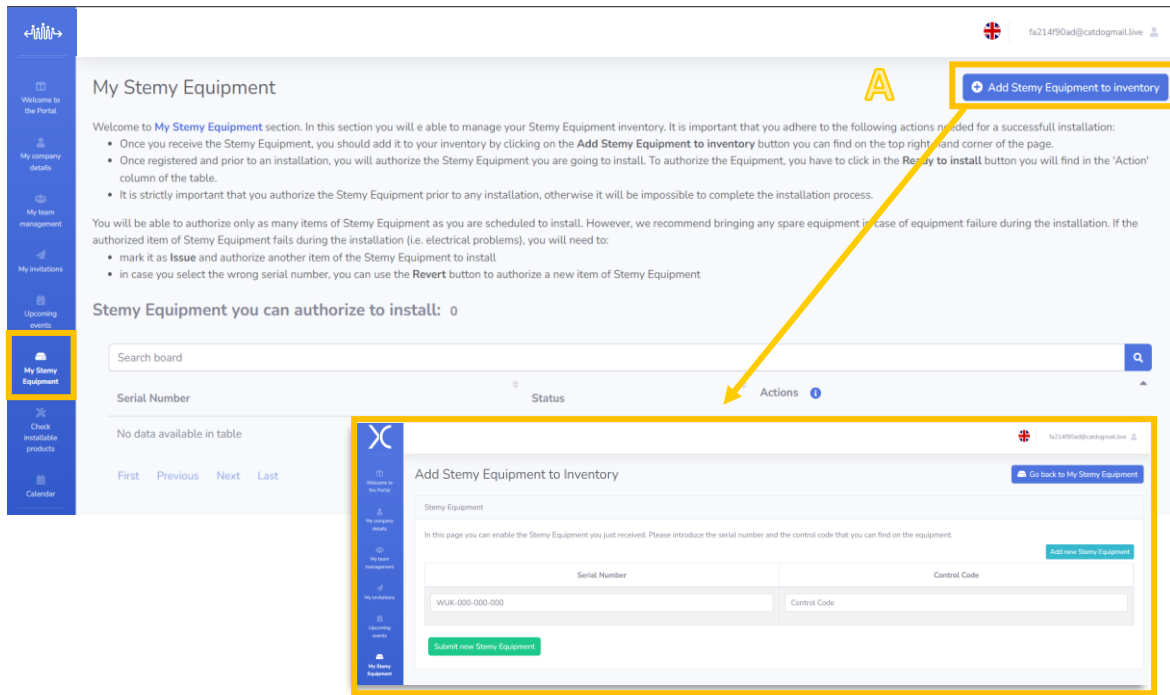


Figure 51 Installer’s Journey: Register Equipment

4.3.6. Installation Visit

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

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.

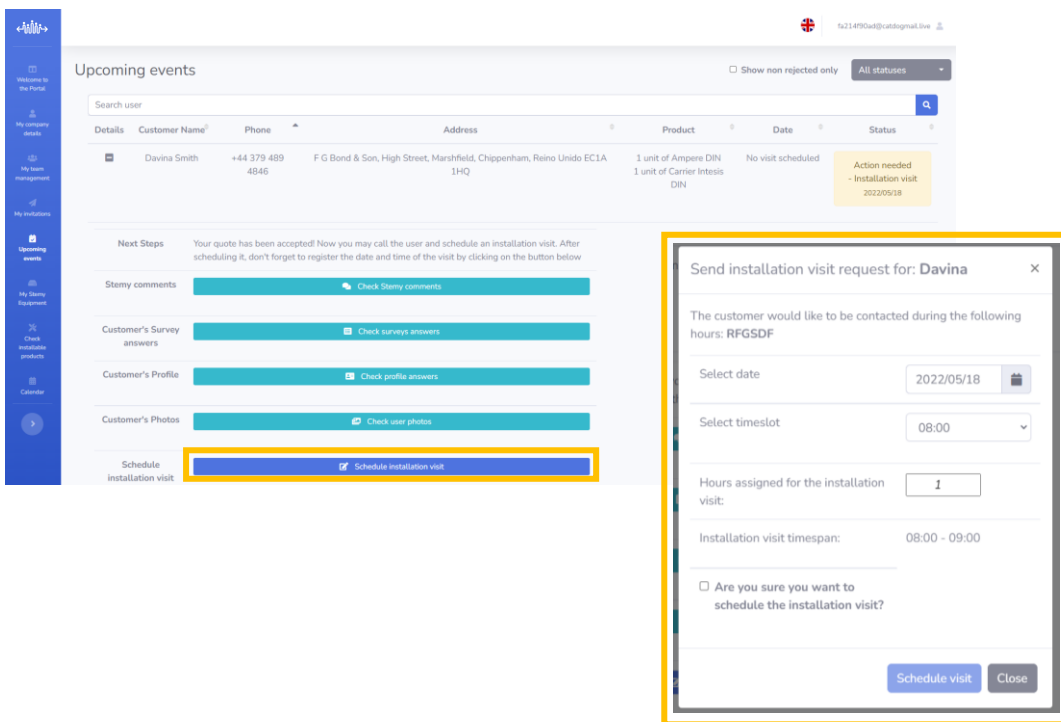


Figure 52 Installer’s Journey: Installation Visit

4.3.7. Authorise Stemy Equipment

The Installer must activate the specific Stemy device the day of the installation in My Stemy Equipment.

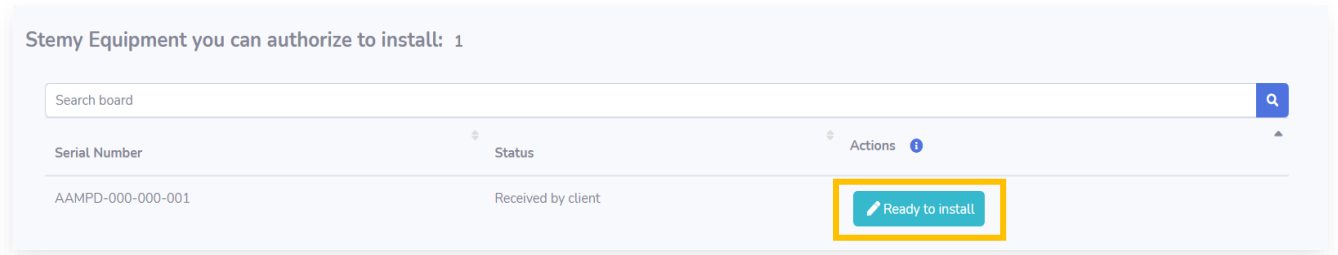


Figure 53 Installer’s Journey: Authorise Stemy Equipment

4.3.8. Installation

Once the above steps have been completed and the installation has been authorised, the Installer can proceed with the installation.

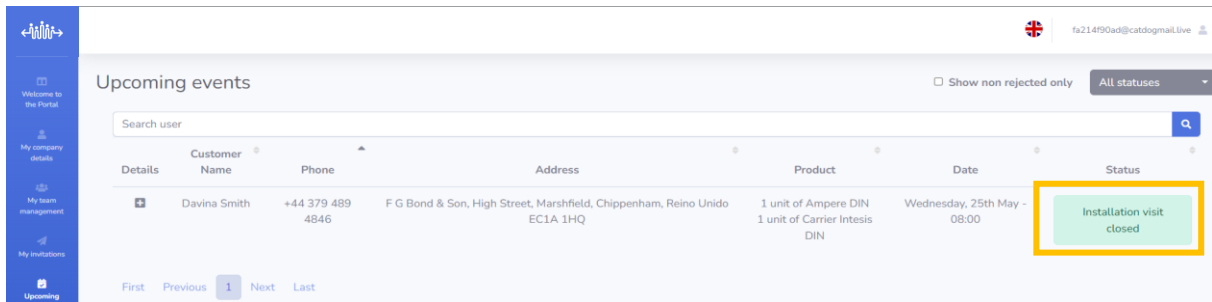
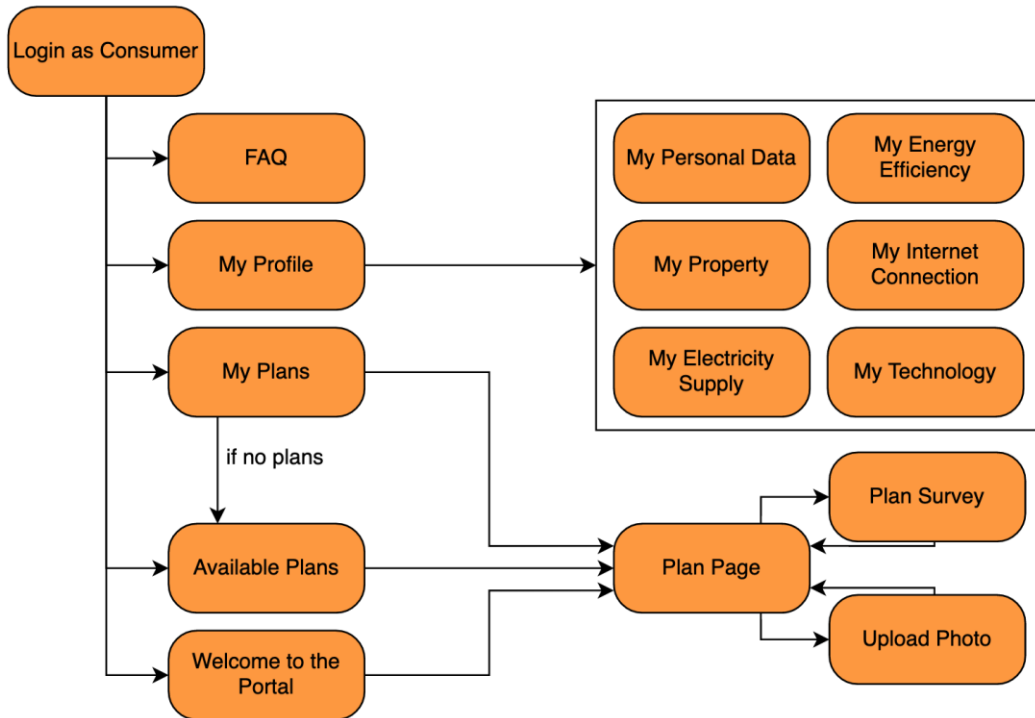


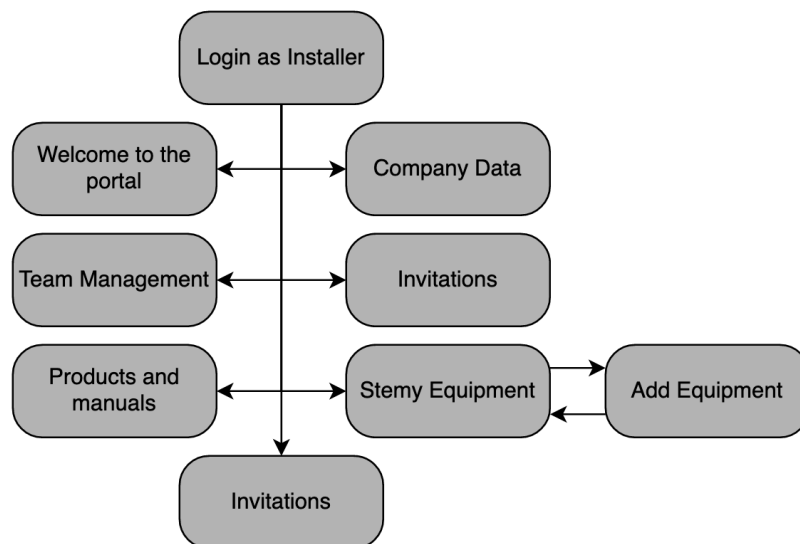
Figure 54 Installer’s Journey: Installation

Annex 1. Consumer Portal Structure Map

1.1 Consumer Map



1.2 Installer Map



1.3 Manager Map

