

## Manual Lead Management for Q.PARTNER

### Functional principle:

The Lead Management gives you the opportunity to claim and process inquiries from potential customers, received via the Q CELLS Solar Calculator.

### Step 1: View of available leads in the Lead Management

- All leads that are in the area of responsibility of the sales employee assigned to you are displayed in the Lead Management on your homepage (see Attachment 1).
- As soon as a new lead is received via the Q CELLS Solar Calculator, you will receive a message by email, allowing you to navigate directly to the lead in the Lead Management.

### Step 2: Claim lead

- You can claim the leads received independently for yourself (see Attachment 2). It is now no longer visible to other fitters. You automatically reserve this lead with your claim for minimum two days.
- **ATTENTION:** If you do not process a claimed lead within these two days, it will automatically be released for the open lead market and become visible to other Q.PARTNER.
- Leads can also be assigned to you indirectly via the sales employee responsible for you. You will be notified by email if this occurs. If you do not process this lead within two working days you will be reminded of this lead once again by email . Inquiries relating to you are displayed under “My Inquiries” in the Lead Management on the homepage and under the tab “New Inquires” (see Attachment 1)

### Step 3: Process lead

- You should process leads that are displayed under “My Inquiries” as soon as possible.
- You have the following options to document the status (see Attachment 3)
  - **Contact attempted:** You have contacted the potential customer in any way regarding their enquiry.
  - **Initial contact made:** You have contacted the potential customer and reached initial agreements.
  - **Offer sent:** You have sent an offer to the customer.
  - **Order placed:** An order has been placed by the enquiring customer.
  - **Not successful:** The enquiring customer has expressly rejected an order or further processing. They do not wish to be advised by another fitter either.

- **Reminder:** You would like to be reminded again about an enquiry at a certain time. Example: You have not contacted the potential customer so far and would like to contact him by phone in two days time.
- **Lead rejected:** You wish to reject a lead for any company-relevant reasons (no time for processing, no capacities for implementation etc.).
- After updating the status, the lead is automatically moved from the “New Inquiries” tab to the tab corresponding to the status (see Attachment 1).
- **NOTE:** Rejected leads are displayed to you with a green icon in the Lead Management. This serves to signal that you were already processing this lead (see Attachment 1).

# Attachments

## Attachment 1: Lead Management Homepage View

**Q CELLS**  
LEAD MANAGEMENT TOOL

Welcome QP DE TESTACCOUNT | Installer | GB | Logout | Q CELLS Website

[SHOW ALL](#) [NEW INQUIRIES](#) [RESUBMISSION](#) [IN PROGRESS](#) [FINISHED](#)

**1** AVAILABLE INQUIRIES (2)

	INITIAL DATE	STATUS	
ID: 520 <b>Test3 GBLondon</b> NWB, London	07.09.2018	12.09.2018 <b>NEW</b>	<a href="#">DETAILS</a>
ID: 529 <b>Test2 GBLondon</b> NW1 3AR, London	13.09.2018	17.09.2018 <b>NEW</b>	<a href="#">DETAILS</a>

**3** MY INQUIRIES (1)

	INITIAL DATE	STATUS	
ID: 533 <b>Test1 GBLondon</b> NW10 2RX, London	13.09.2018	17.09.2018 <b>LEAD CLAIMED</b>	<a href="#">DETAILS</a>

**4**

1

“Available Inquiries” as display of the leads received via the Q CELLS Solar Calculator, which you can claim for yourself

2

A lead with:

- Lead data (ID, name & postcode of the potential customer)
- Date received
- Status display, e.g. “New” or “Lead claimed”
- If applicable, icon as a reminder that you were already processing this enquiry
- “Details” function, in which you can view further details of the lead

3

“My Inquiries” as display of the leads you have claimed

4

Views of the leads sorted by status (here: “Show all”)

## Attachment 2: Enquiry Details View – Project Information

### DETAILS

**NEW**

## LEAD DETAILS ID: 520

INITIAL DATE 07.09.2018

### PROJECT INFORMATION

[PRINT](#)

#### CONTACT INFORMATION

Name	Test3 GBLondon
Address	Abbey Road 3 NW8 London
Email	<a href="mailto:fellbaum@mellowmessage...">fellbaum@mellowmessage...</a>
Phone	32423
Availability	anytime
Message	

#### CONSUMPTION

People	1
Yearly consumption	2000 kWh
Average electricity price	12 p / kWh
Consume	weekdays and weekend

#### ROOF INFORMATION

Roof size	178.05 m <sup>2</sup>
Roof pitch	30 °
Roof alignment	179 °
Selected module	Q.PEAK DUO BLK-G5 und Q.PEAK DUO-G5
Number of modules	6
Interested in storage solutions?	Yes

COSTS PER MONTH		COSTS PER YEAR		COSTS AFTER 20 YEARS	
With PV system	12.00 £	With PV system	148.00 £	With PV system	3990.00 £
Without PV system	20.00 £	Without PV system	240.00 £	Without PV system	6449.00 £
Savings	18.00 £	Savings	217.00 £	Savings	5384.00 £

#### LCA AFTER 20 YEARS

CO <sub>2</sub> -Savings	19837 kg	Trees	269
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**5** Claim lead

**5** Claim inquiry by clicking on the button

## Attachment 3: Inquiry Details View – Status

DETAILS

### LEAD DETAILS ID: 533

INITIAL DATE  
13.09.2018

PROJECT INFORMATION **STATUS**

LEAD CLAIMED 17.09.2018

Request was claimed by QP DE TESTACCOUNT

CHANGE STATUS **6** DATE CONTACT TYPE

- ✓ Contact attempted
- Initial contact made
- Offer sent
- Order placed
- Not successful
- Reminder
- lead available again

PRINT

SET STATUS

**6** Change processing status via dropdown menu