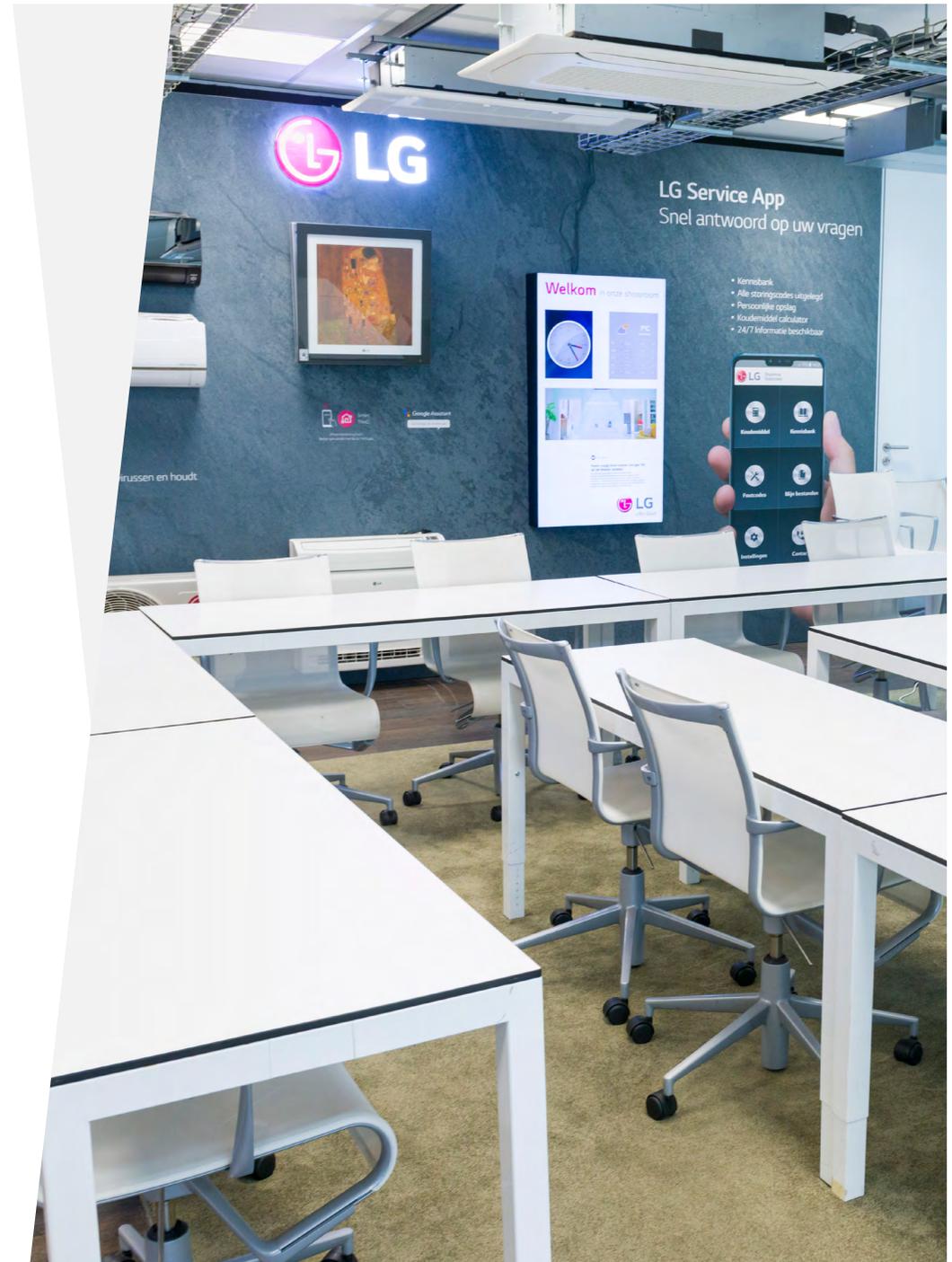
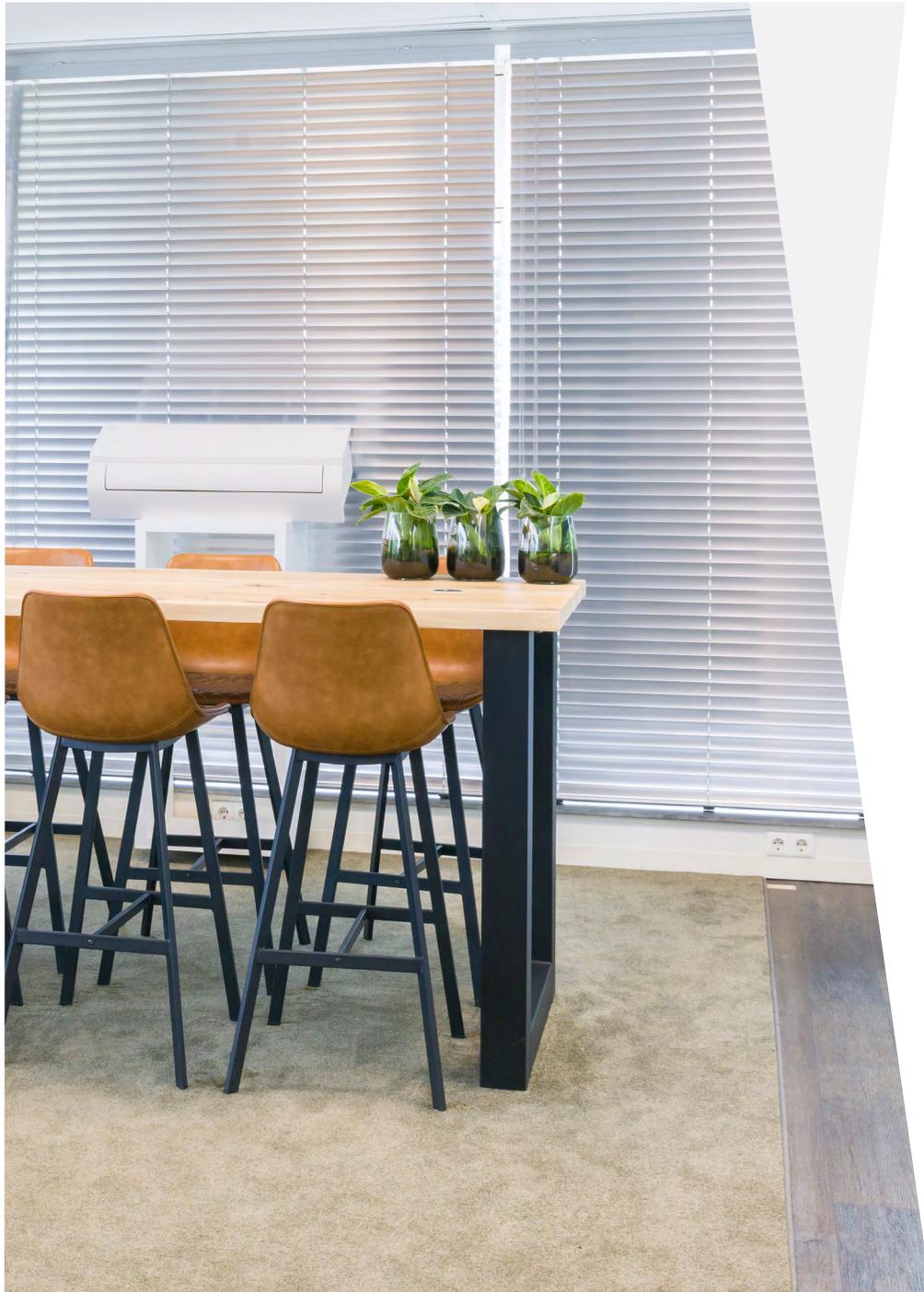


LG Lead Platform

Manual





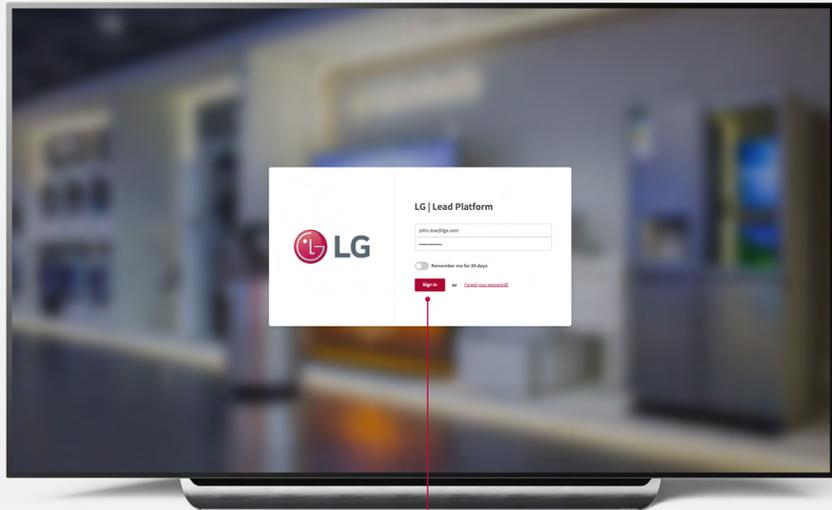
Introduction

The LG Lead Platform is a user-friendly platform that facilitates excellent collaboration between LG and installers. The LG Lead Platform provides installers with leads, ensuring increased efficiency and convenience.

Contents

- 4** Logging into the Lead Platform
- 5** Leads
- 6** Dashboard
- 7** Leads overview page
- 8** Lead detail page
- 9** Procedure for installers
 - 9** Step 1: Accepting & following up on leads
 - 9** Step 2: Logging in
 - 9** Step 3: Leads overview
 - 10** Step 4: Lead detail page
 - 11** Step 5: Quotation amount
 - 12** Step 6: Installation date
 - 13** Step 7: Installation completed
 - 14** Step 8: Customer rating
- 15** Rating
- 16** (In)activity of your account
- 17** Vacation mode





→] Sign in

Logging in to the LG Lead Platform

Installers receive personal login credentials to access the LG Lead Platform.

Leads

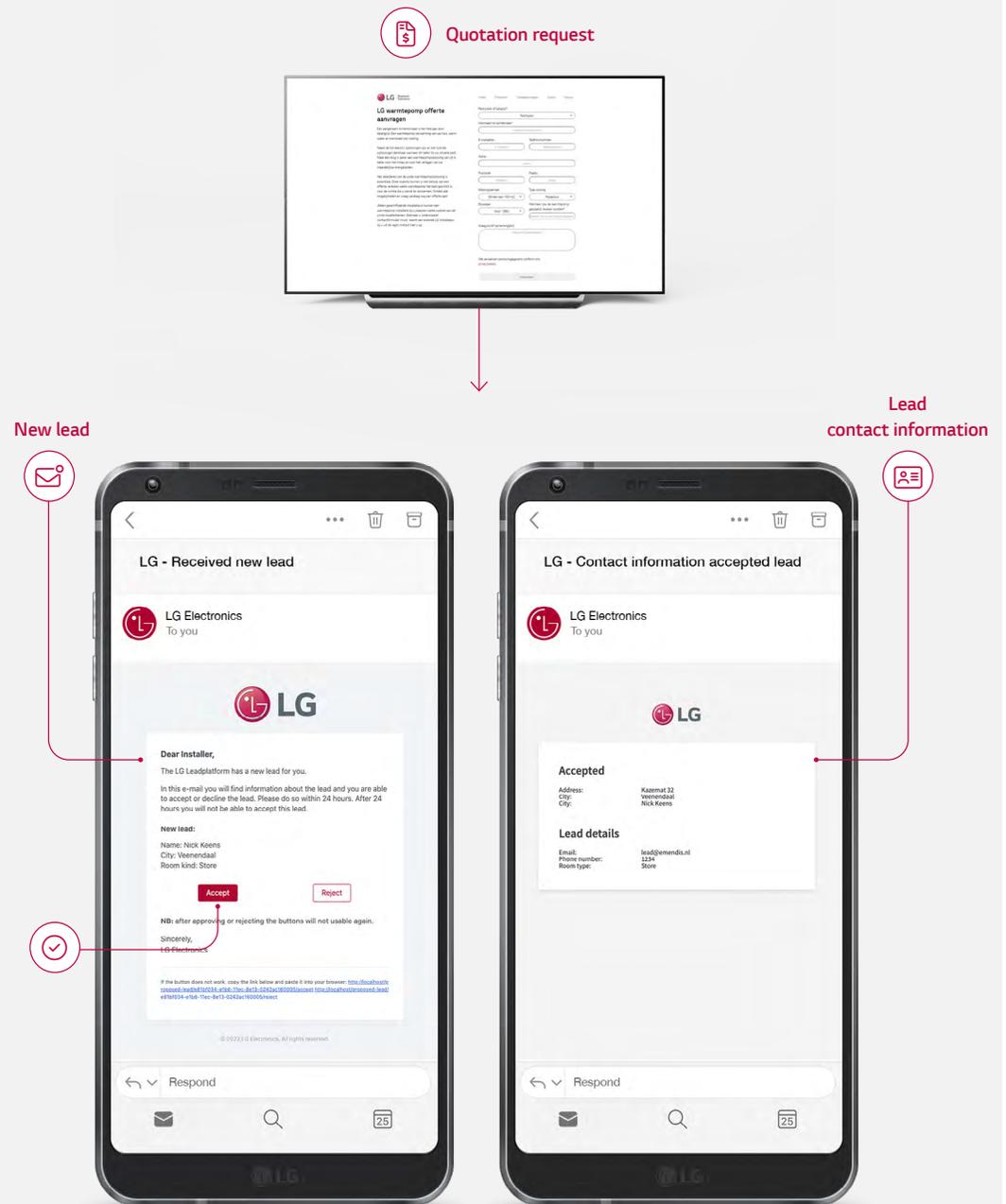
Through the website, customers can request a quote for the installation of a heat pump.

Quotation requests are sent as leads to installers via email. The installer can accept or reject it within 24 hours; after 24 hours, the lead will be offered to another installer. Leads received after Friday 5:00 PM will remain available until the following Monday at 5:00 PM.

Upon acceptance, the installer receives the customer's contact details via email. These contact details are then visible in the LG Lead Platform. The contact information is used to schedule an appointment with the customer.

ATTENTION!

After accepting the lead in your email, the customer's contact details are only visible once. If you open your email a second time, the customer information will no longer be visible. To review them again, you need to log in to the [dashboard](#).



Dashboard

In the dashboard, you'll find information regarding leads, quotations, statuses, and a personal score.

The dashboard provides a comprehensive overview of lead management. It includes key performance indicators, a list of most sold models, a lead status distribution chart, and a detailed view of the longest response time. The installer's current status and review scores are also displayed.

Overview (Target icon)

Bestselling models (Line graph icon)

Longest response time (Clock icon)

Profile settings (User icon)

Lead status (Pie chart icon)

Installer status (Installer icon)

Review score (Star icon)

Model	Sold
Monobloc R290	6
Warmtepompboiler	5
Split Wandmodel Hydrokit	4
Split Hoge Temperatuur	3
Split IWT	3
Hydrosplit Wandmodel Hydrokit	2
Monobloc S	2

Status	Count
Allocated	1
Planned	1
Quoted	1
Approved	1
Installed	0
Reviewed	0

Lead	Duration
Louis van de heuvel	3m

Category	Score
Average rating	★★★★☆ (5.00)
Installation	★★★★☆ (5.00)
Service	★★★★☆ (5.00)

Lead overview page

On the lead overview page, all accepted leads are displayed.

Filter

Search function, filter by status, or request date

Lead list

List with important information about leads.

Status

Here is the status of a lead: Assigned, Planned, or Installed.

The screenshot shows the LG Lead Platform interface. At the top, there is a search bar and filter options for 'Allocated' and 'Application date'. A 'Clear filters' button is also present. Below the search bar is a table with the following columns: Lead type, Lead name, Address, Zip code, City, Responsible installer, Status, Status duration, Application date, and Comments. The table contains 8 rows of lead data. At the bottom of the table, there is a pagination control showing 'Showing 10 of 8 results' and a page number '1'.

Lead type	Lead name	Address	Zip code	City	Responsible installer	Status	Status duration	Application date	Comments
Business	Graeme Thompson	Langerakbaan 179	3544 PE	Utrecht	John Installer	Allocated	2w 1d 20h 44m	30-04-2022	
Business	Tim Davidson	Tweede Oosterparkaan 258	3544 AW	Utrecht	John Installer	Allocated	2w 1d 20h 46m	15-04-2022	
Business	Laura Benth	Pieter Moeskospad 20	1067 HR	Amsterdam	John Installer	Allocated	2w 1d 20h 49m	1-2022	
Business	David Holmes	Plesmanlaan 121	1066 CX	Amsterdam	John Installer	Allocated	2w 1d 20h 51m	21-04-2022	
Private	Rick Carlson	Sloterweg 1043 H	1066 CD	Amsterdam	John Installer	Allocated	2w 1d 20h 52m	21-04-2022	
Business	Sam Banks	Kruisboog 29	3905 TG	Veenendaal	John Installer	Allocated	2w 1d 20h 54m	20-04-2022	
Private	Nick Keens	Kazemat 32	3905 NR	Veenendaal	John Installer	Allocated	2w 1d 21h 16m	21-04-2022	
Business	John Smith	30 Toltohill Gardens	AB12 5DX	Aberdeen	John Installer	Allocated	2w 1d 21h 23m	19-04-2022	

Lead detail page

The lead detail page displays all details of a lead. On this page, a lead can be edited and transitioned to different statuses.

Lead information
All information regarding the lead.

Appointment date
Enter the appointment date here.

Installation information

Here, all information regarding the installation is filled in, and the current status is displayed. Depending on the status to which you change the lead, various additional fields may be required. Properly filling in the quotation amount, products, and obtaining approval for the quotation is crucial, as this leads to receiving more leads.

Finish installation

After the installation is completed, it must be indicated here. The customer now has the opportunity to rate the installer.

Lead is not proceeding

Enter the reason why the lead is not proceeding.

Edit lead

Use this button to change the status of this lead.

Timeline

A timeline of the various status changes:

- Suggested
- Assigned
- Accepted
- Appointment scheduled
- Quoted
- Approved
- Planned
- Installed
- Rated

Rating

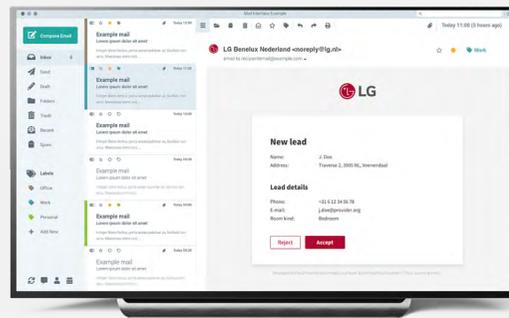
The rating of the lead is displayed here.

The screenshot displays the 'Lead detail page' for a lead named 'Heinz'. The interface includes a top navigation bar with 'Back to overview' and 'Lead | Heinz'. The main content area is divided into several sections: 'Lead information' (request submitted on: 02-11-2023, zip code: 1234 AB, lead name: Heinz, address: Diamantstraat 34, lead type: Business, city: Hilversum, living space: More than 250 m2, email: info@heinz.nl, construction year: After 2010, phone: 0900-1289, type of building: Semi detached, preferred installation date: 02-11-2023), 'Linked installer information' (status: Planned, installer: Warmtepomp centraal, appointment date: 02-11-2023), 'Products' (Hydrosplit IWT, Hydrosplit Wandmodel Hydrokit, Split IWT, Warmtepompboiler, Split Wandmodel Hydrokit, Monobloc R290, Monobloc S, Split Hoge Temperatuur), 'Quote price (ex. VAT): 4555', 'Installation date: 02-11-2023', 'Timeline' (showing status changes: Planned, Approved, Appointment Made), 'Review given by lead' (no review yet), and 'Duplicate leads' (no duplicates). Action buttons include 'Finish installation', 'Drop this lead', and 'Edit Lead'. A 'Rating' section at the bottom right shows a star icon.

Procedure for Installers

1 Accepting & following up on leads

The installer accepts the lead and schedules an appointment by making contact.



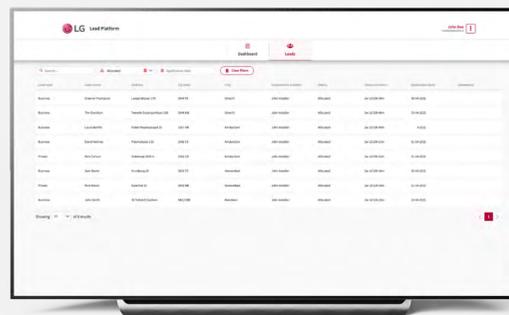
2 Sign in

After the installer has scheduled the appointment, the installer logs in to the LG Lead Platform.



3 Leads overview

Go to the 'Leads' overview page; here, all leads of the installer are listed.



4

Leads detail page

Click on the respective lead to access the 'Leads detail page', where the installer can continue the process. The timeline shows the current status of the lead, which changes as the installer progresses through the steps. Click on 'Edit Lead' to modify the lead and proceed to step 4.

LG Lead Platform

Installer John
j.doo@lg.nl
Huisgroep

[Back to overview](#)
Lead | Maïke de Groot

[Drop this lead](#) [Edit Lead](#)

Lead information

Request submitted on: *	Zip code *
07-11-2023	4423 HG
Lead name *	Address *
Maïke de Groot	Emmastraat 12
Lead type *	City *
Private	Arnhem
Living space *	Email *
Less than 100 m2	maikedegroot@hotmail.com
Construction year *	Phone *
1980 - 1990	065378644
Type of building *	Preferred installation date
Apartment	07-11-2023

Comments

Linked installer information

Status !
Appointment Made

Installer*
LG installer

Appointment date
07-11-2023

Products
No results found

Quote price (ex. VAT)
 Quote is approved by lead

Timeline

Show full timeline

- 07-11-2023 11:51
Status has been changed to 'Appointment Made'
- 07-11-2023 11:51
Lead accepted by 'LG installer'
cool air 4 u
- 07-11-2023 11:51
Status has been changed to 'Allocated'

Review given by lead
There is no review yet

Duplicate leads
No duplicates

Edit

Timeline

5

Quotation amount

Enter the quotation amount for only the indoor and outdoor units (excluding VAT), indicate whether the quotation has been approved by the customer, and optionally add the products. Save the data after everything has been entered correctly.

The screenshot shows the LG Lead Platform interface for a lead named 'Maïke de Groot'. The form is divided into several sections:

- Lead information:** Request submitted on: 07-11-2023, Zip code: 4423 HG, Lead name: Maïke de Groot, Address: Emmastraat 12, Lead type: Private, Living space: Less than 100 m2, Construction year: 1980 - 1990, Type of building: Apartment, Email: maikedegroot@hotmail.com, Phone: 065378644, Preferred installation date: 07-11-2023.
- Linked installer information:** Status: Appointment Made, Installer: LG installer, Appointment date: 24-11-2023, Products: No results found.
- Timeline:** Shows a sequence of events: 07-11-2023 11:51: Status has been changed to 'Appointment Made'; 07-11-2023 11:51: Lead accepted by 'LG installer'; 07-11-2023 11:51: Status has been changed to 'Allocated'.
- Quote price (ex. VAT):** 4435.
- Quote is approved by lead:** A checkbox that is currently unchecked.

Annotations on the right side of the image point to specific elements:

- Save:** Points to the green 'Submit' button.
- Add product:** Points to the 'Add product(s)' button.
- Quotation amount:** Points to the 'Quote price (ex. VAT)' field.
- Quotation amount approved:** Points to the 'Quote is approved by lead' checkbox.

6

Installation date

Now, the input field for the installation date appears. After the quotation has been approved, enter the installation date and then save it.

The screenshot displays the LG Lead platform interface for a lead named 'Maïke de Groot'. The interface is divided into several sections:

- Lead information:** Includes fields for 'Request submitted on:' (07-11-2023), 'Zip code:' (4423 HG), 'Lead name:' (Maïke de Groot), 'Address:' (Emmastraat 12), 'Lead type:' (Private), 'City:' (Amsterdam), 'Living space:' (Less than 100 m2), 'Email:' (maikedegroot@hotmail.com), 'Construction year:' (1980 - 1990), 'Phone:' (065378644), 'Type of building:' (Apartment), and 'Preferred installation date:' (07-11-2023).
- Linked installer information:** Includes 'Status:' (Appointment Made), 'Installer:' (LG installer), and 'Appointment date:' (24-11-2023).
- Timeline:** Shows a list of events: 'Status has been changed to 'Appointment Made'', 'Lead accepted by 'LG installer'', and 'Status has been changed to 'Allocated''. A 'Show full timeline' link is present.
- Review given by lead:** A section with the text 'There is no review yet'.
- Duplicate leads:** A section with the text 'No duplicates'.

Annotations on the screenshot include:

- A red circle with the number '6' pointing to the 'Appointment date' field.
- A red circle with a calendar icon and the text 'Installation date' pointing to the calendar widget.
- A red circle with a save icon and the text 'Save' pointing to the 'Submit' button.

7

Installation completed

After completing the installation, the installer indicates this by using this button.



Finish installation

The screenshot displays the 'LG Lead Platform' interface for a lead named 'Heinz'. The interface is divided into several sections:

- Lead information:** Includes fields for 'Request submitted on:' (02-11-2023), 'Zip code *' (1234 AB), 'Lead name *' (Heinz), 'Address *' (Diamantstraat 34), 'Lead type *' (Business), 'City *' (Hilversum), 'Living space *' (More than 250 m2), 'Email *' (info@heinz.nl), 'Construction year *' (After 2010), 'Phone *' (0900-1289), 'Type of building *' (Semi detached), and 'Preferred installation date' (02-11-2023). There is also a 'Comments' section.
- Linked installer information:** Includes 'Status' (Planned), 'Installer*' (Warmtepomp centraal), 'Appointment date' (02-11-2023), 'Products' (Hydrosplit IWT, Hydrosplit Wandmodel Hydrokit, Split IWT, Warmtepompboiler, Split Wandmodel Hydrokit, Monobloc R290, Monobloc S, Split Hoge Temperatuur), 'Quote price (ex. VAT)' (4555), 'Quote is approved by lead' (checked), and 'Installation date' (02-11-2023).
- Timeline:** Shows a 'Show full timeline' link and three entries: '02-11-2023 13:41 Status has been changed to 'Planned'', '02-11-2023 13:41 Status has been changed to 'Approved'', and '02-11-2023 13:18 Status has been changed to 'Appointment Made''. Below this are sections for 'Review given by lead' (There is no review yet) and 'Duplicate leads' (No duplicates).

At the top right of the interface, the user is identified as 'Installer John'. Below the user name are three buttons: 'Finish installation' (highlighted in green), 'Drop this lead', and 'Edit Lead'.

8

Customer rating

The respective customer now has the opportunity to rate the installer. The installer can find the rating on the 'Lead detail page'. The process is completed.

LG Lead Platform Installer John
J.Gerrits
Heagumps

[Back to overview](#) Drop this lead

Lead | Supra Bv

Lead information

Request submitted on: *	Zip code *
07-11-2023	1312 KR
Lead name *	Address *
Supra Bv	Savofoonweg 78
Lead type *	City *
Business	Almere
Living space *	Email *
More than 250 m2	info@suprabv.nl
Construction year *	Phone *
After 2010	0800633473
Type of building *	Preferred installation date
Detached house	10-11-2023

Comments

Linked installer information

Status 🔔
Reviewed

Installer*
LG installer

Appointment date
07-11-2023

Products

1	Hydrosplit IWT
2	Hydrosplit Wandmodel Hydrokit
3	Split IWT
4	Split Wandmodel Hydrokit
5	Warmtepompboiler
6	Monobloc R290
2	Monobloc S
3	Split Hoge Temperatuur

Quote price (ex. VAT)
8000

Quote is approved by lead

Installation date
07-11-2023

Timeline Show full timeline

07-11-2023 11:40
Status has been changed to 'Reviewed'

07-11-2023 11:40
Status has been changed to 'Installed'

07-11-2023 11:40
Status has been changed to 'Planned'

Review given by lead

Installation
★★★★★

Service
★★★★★

Optional remark(s)

Duplicate leads
No duplicates



Customer rating

Rating

A few days after the installation date, the lead receives an email to rate the installer. The lead can rate the installer on 2 dimensions:

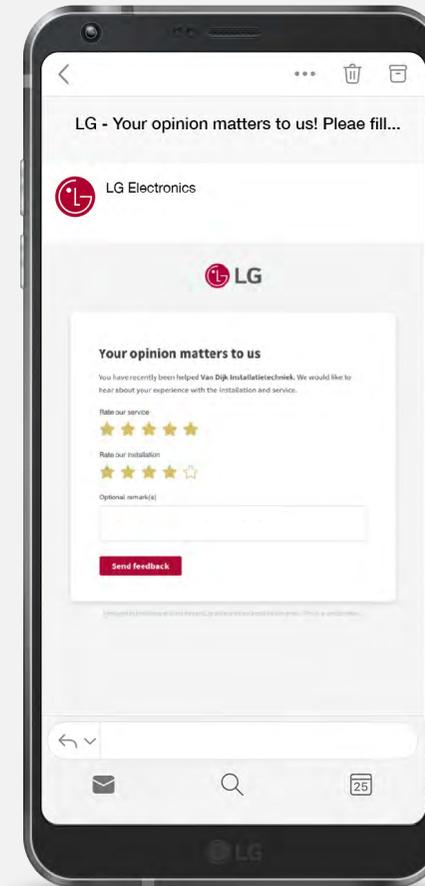
- ✓ Service
- ✓ Installation

Once the rating is done, the process is completed.

The rating can be found on the lead detail page. The average rating of all leads is displayed on the dashboard.

ATTENTION!

By correctly completing all steps, as an installer, you can increase your average rating. The better your rating, the more leads you will be assigned. Completing all steps is rewarded.

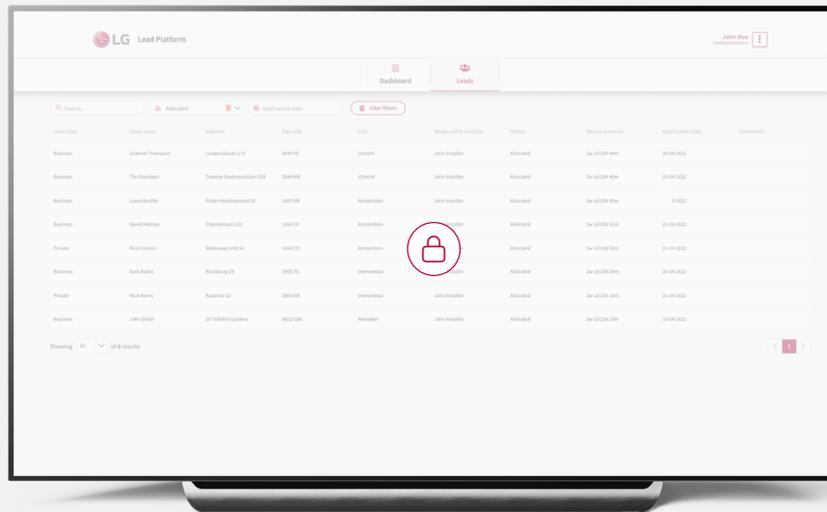


(In)activity of your account

If you don't log in for 8 weeks, your account will be automatically set to inactive. You will receive a notification via email.

If you don't log in to the platform for 8 weeks, your account will be automatically marked as inactive. This means that your account will temporarily not receive leads, and you won't be able to use the platform's functionalities until you log in again.

Once you log in again, you'll need to reactivate your account to resume using the Lead Platform. Therefore, it's important to log in regularly to prevent your account from becoming inactive.



The screenshot displays the LG Lead Platform interface. At the top, there's a navigation bar with 'Dashboard' and 'Leads' tabs. Below the navigation, there's a search bar and a 'Clear Filter' button. The main content area is a table with columns: Lead type, Lead name, Address, Zip code, City, Responsible lead, Status, Status duration, Application date, and Documents. The table lists several leads, and a red padlock icon is overlaid on the 'Status' column of the lead for 'Nick Carter'.

Lead type	Lead name	Address	Zip code	City	Responsible lead	Status	Status duration	Application date	Documents
Business	Quinn Thompson	Lansdowne 275	2404 PA	Urbana	John Mueller	Allocated	2w 12:04:45m	30-04-2022	
Business	Tim Davidson	Towhee Overparkway 218	2544 AV	Urbana	John Mueller	Allocated	2w 14:25:46m	25-04-2022	
Business	Louis Bertha	Water Mainwood 20	2407 HA	Urbana	John Mueller	Allocated	2w 14:25:45m	4-2022	
Business	David Holmes	Plumtree 111	2580 CA	Urbana	John Mueller	Allocated	2w 14:25:45m	21-04-2022	
Private	Nick Carter	Waterway 104-14	2404 CA	Urbana	John Mueller	Allocated	2w 14:25:45m	21-04-2022	
Business	Sam Banks	Knoblog 79	2522 TG	Urbana	John Mueller	Allocated	2w 14:25:45m	25-04-2022	
Private	Nick Myers	Kennel 14	2623 HA	Urbana	John Mueller	Allocated	2w 14:25:45m	21-04-2022	
Business	John Smith	30 Tullamore Gardens	4512 10P	Northon	John Mueller	Allocated	2w 14:25:45m	25-04-2022	

Vacation mode

Change your account status yourself during absence or vacation.

As an installer, you can manually adjust the active status of your account on the LG Lead Platform. For example, if you're going on vacation and won't be using the platform during that time, you can choose to set your account to inactive to prevent leads from being assigned to you that you won't be able to follow up on.

When you return, you can activate your account at any time to regain access to all platform functionalities. Therefore, it's important to check your account status and adjust it if necessary to ensure that you have control over the leads assigned to you.

