

LEVETO

WHAT IS LEVETO?

LEAD.
LEAD MANAGEMENT.
LEAD DISTRIBUTION.
QUALIFICATION.
SCHEDULING.
ROUTE PLANNING.
(ONLINE) CONSULTING.
(DIGITAL) SALE.
SALES FORCE MODULE.
COMMISSION ACCOUNTING.
CRM.
OFFER.
ORDER CONFIRMATION.
INVOICING.
DELIVERY BILL.
MEDIA LIBRARY.
WAREHOUSE.
ROOF PLANNER.
AUTOMATIC WORKFLOWS.
TICKET SYSTEM.
E-MAIL.



**Avoid coffee and cake
meetings by using LEVETO Portal.**

LEVETO's work processes are optimized to reduce your administrative expenses by at least 50 % and to significantly reduce the workload on your staff.

- Lead management and distribution
- Lead qualification via customised questionnaires
- Appointments and route planning
- CRM – customer administration
- Consulting via personal end customer portal
- Offer, order and invoice creation
- Roof planner and installation workflow
- Field service function
- Ticket system
- Commission accounting

Numerous APIs to lead providers plus flexible lead importer.

LEADS.

Lead management and distribution – LEVETO Networking

Lead management

From submission to qualification with specially designed questionnaires - our lead management provides you with an overview and evaluation of all your leads. In the lead history, you can see all the processes that the lead has gone through in chronological order.

In **LEVETO**, you can see at any time when the lead was assigned to which employee or partner and what the processing status of all other processes is.

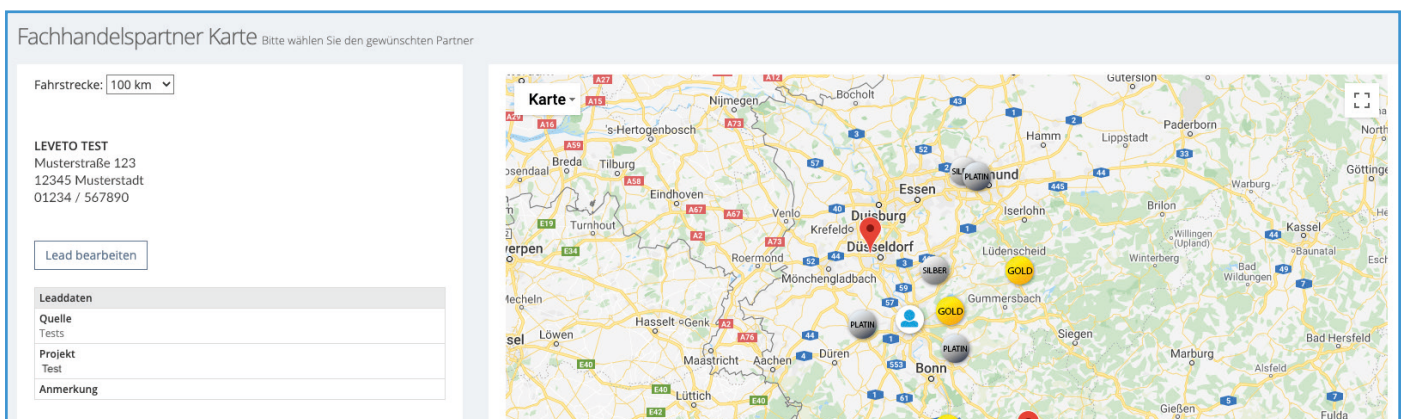
LEVETO has various interfaces for imports and exports and thus represents a link between the lead source, CRM and merchandise management.

Lead distribution

With automated lead allocation, leads can be sent to internal or external partners within **LEVETO**. You can automate this process by specifying certain criteria. With just one click, the lead is sent to the selected employee or

partner in compliance with the GDPR.

Leads can be distributed either from the questionnaire, immediately after qualification, or via the lead allocation table. Only suitable employees or partners are displayed for the respective lead in the lead allocation table.



Lead qualification via individual questionnaires

In order to generate a high-quality lead, it is important that customer data and specific questions to the customer can be asked and recorded quickly and easily. In **LEVETO**, you can create your own questionnaires, even with branching logic.

You can have the questions answered via selection menus, checkboxes or free text fields. You can also assign your leads a status that you define after qualification. The lead quality can be determined using evaluations and statistics.

Lead potential

Specially developed for lead agencies and marketing departments

The lead potential feature calculates and shows you the relationship between lead capacity and lead potential as a percentage and visually. The result shows the utilization in percent.

The lead capacity is the sum of the leads that the lead buyers want. The lead potential is the leads generated. The utilization rate shows whether the ratio of lead potential and lead capacity matches.

The evaluation can be narrowed down according to time periods, two- and three-digit zip code areas, sales territories and the parameters capacity, utilization and potential.

This allows you to see at a glance how you can manage your marketing activities in the future.

Appointments and route planning

LEVETO takes the employee's home zone into account when planning the route. This is the address from which the first appointment is made.

When scheduling further appointments, **LEVETO** takes into account the address of the previous appointment and calculates travel time, distance and appointment duration to the next destination.

LEVETO suggests the most effective sequence of appointments in advance so that you can make optimum use of your employees' and partners' time. If a conflict arises,

for example if a follow-up appointment cannot be kept because the travel time is too long, **LEVETO** will inform you. This allows your employees and partners to use their valuable time fully for your customers instead of spending it on a lengthy journey.

In the appointment details, you can see all relevant customer information that your employees need for further processing. **LEVETO** calendar shows you the appointments of all your employees, even in detail, with a single click.

APIs and interfaces

We offer connections to exchange servers. You can synchronize the **LEVETO** calendar with your Google Calendar, Apple Calendar or Outlook Calendar.

Of course, connecting to one or more lead suppliers is no problem. The leads are marked with the respective

source in the lead allocation table. API connections to **LEVETO** already exist for the major lead generators, such as SENEK, WattFox, DAA and Aroundhome. If you require other or additional webhooks, we can program these on request.

CRM.

CRM – customer management

Our aim is to design our customers' consulting and sales processes in such a way that they can advise their customers quickly and professionally - and ultimately sell their products successfully.

In addition to automated processes for creating offers, order confirmations and invoices, **LEVETO** offers a variety of individual settings, such as inserting product information, data sheets, etc. into your PDF documents. These documents are created in your corporate design.

LEVETO portal licensees are informed about the customer's activities in the end customer portal in **LEVETO**. In the customer data record, you can see, for example, when the customer requests an offer, reads an offer you have

created, or has accepted or rejected it.

The CRM contains a customer history in which all processes are recorded chronologically, as well as which employee processed the customer and when.

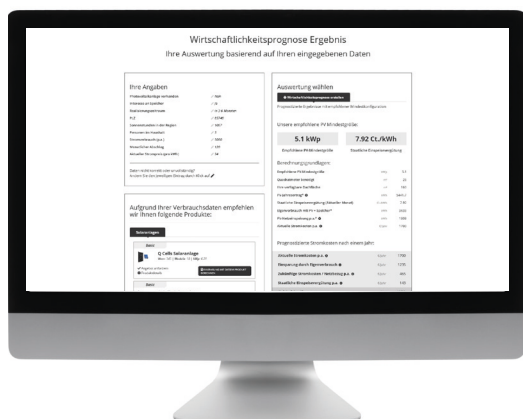
There is also a media library for each customer in the data record, in which you can save images and documents relating to the customer. **LEVETO** portal users can also view images and documents that the customer uploads via the end customer portal.

An explanation about the end customer portal and its features can be found on the following pages.

(ONLINE-) CONSULTING.

Advice via personal end customer portal

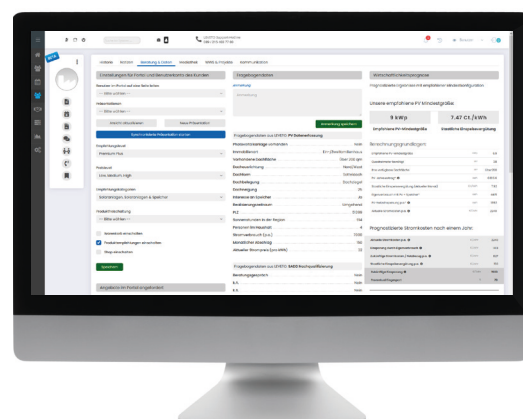
Customer perspective Your end customer portal



Enter relevant data
Upload relevant images

View advice
View offers

Consultant's perspective CRM



View customer data
Manage customer data

Advise and demonstrate
Create offers

LIVE
DATA
EXCHANGE
on phone and PC.

—+—
Your customer actively collaborates!

With **LEVETO** Portal, you can provide your customers with professional advice, present your products and create offers. All this in real time during a telephone call or in an appointment on site.

The consultation via **LEVETO** Portal can serve as preparation for the visit to your customer or the purchase transaction - just as you wish.

The end customer portal is a portal integrated into your website that your customer can access using the access data you provide.

Once the end customer has logged in to the portal, they can upload data, documents and photos, such as pictures of the roof, meter box or the last electricity bill, to the media library, which you can access immediately in the CRM. This can be done in advance of a joint meeting.

Your customers are encouraged to actively participate and work with you. The customer is „on board“, thinks about things and does the work of compiling the data.

At this point, you know:
This won't be a coffee and cake appointment!



Based on the customer's consumption data, product recommendations are displayed and a profitability calculation is made for its planned photovoltaic system. During the consultation, you can direct the customer to specific pages in the portal or display product descriptions, images and presentations.

You can also categorize products and determine whether and which product category should be recommended to the customer.

The customer can independently request offers for products in the end customer portal, about which you will be informed in **LEVETO**. You then add the desired item to the offer with a mouse click and send it to the customer by email or hand it over to the customer in the end customer portal.

The customer can accept or reject the offer, of which you will also be notified in the CRM. If the customer accepts the offer, you can generate the order confirmation with a click.

While writing the offer, the integrated roof planner can be used to assign modules to available roof photos and visualize them for the customer.

Customer advisory page CRM

We connect you
and your customers
via **LEVETO Portal!**

The screenshot displays the LEVETO CRM interface with a sidebar on the left containing navigation icons and a 'BETA' label. The main content area is divided into several sections:

- Historie, Notizen, Beratung & Daten, Mediathek, WWS & Projekte, Kommunikation** (top navigation bar)
- Einstellungen für Portal und Benutzerkonto des Kunden** (left sidebar): Includes dropdowns for 'Benutzer im Portal auf eine Seite leiten', 'Präsentationen', 'Preislevel', 'Empfehlungskategorien', and 'Produktfreischaltung'. Buttons for 'Ansicht aktualisieren', 'Neue Präsentation', 'Synchronisierte Präsentation starten', 'Speichern', and 'Angebote im Portal angefordert' are also present.
- Fragebogendaten** (center): A form for 'Anmerkung' with a 'Speichern' button. Below it, 'Fragebogendaten aus LEVETO: PV Datenerfassung' and 'Fragebogendaten aus LEVETO: SADD Nachqualifizierung' sections contain various data points like 'Photovoltaikanlage vorhanden', 'Immobilienart', 'Vorhandene Dachfläche', etc.
- Wirtschaftlichkeitsprognose** (right): A section titled 'Prognostizierte Ergebnisse mit empfohlener Mindestkonfiguration'. It displays 'Unsere empfohlene PV Mindestgröße: 9 kWp' and '7.47 Ct./kWh'. Below this is a table for 'Berechnungsgrundlagen' and 'Prognostizierte Stromkosten nach einem Jahr'.

Parameter	Value
Empfohlene PV-Mindestgröße	9 kWp
Quadratmeter benötigt	38
Ihre verfügbare Dachfläche	Über 200
PV-Jahresertrag*	6306.6 kWh
Staatliche Einspeisevergütung (Aktueller Monat)	7.92 Ct./kWh
Eigenverbrauch mit PV + Speicher*	4415 kWh
PV-Netzeinspeisung p.a.*	1892 kWh
Aktuelle Stromkosten p.a.*	2240 Ct./Jahr

Parameter	Value
Aktuelle Stromkosten p.a.*	2240 Ct./Jahr
Einsparung durch Eigenverbrauch	1413 Ct./Jahr
Zukünftige Stromkosten / Netzbezug p.a.*	827 Ct./Jahr
Staatliche Einspeisevergütung p.a.*	150 Ct./Jahr
Zukünftige Einsparung	1563 Ct./Jahr
Prozentualer Einsparpart	70 %

Remote control

There is an important function in the „Portal and customer user account settings“: directing users to a page in the portal. This allows the advisor to remotely control which portal page the customer is currently viewing in the web browser.

Presentation mode

You can show your customer various presentations during the consultation. For example, product data sheets or company information.

Customize settings

The recommendation level defines whether and which products in which price segment should be recommended to the customer in the end customer portal based on their consumption data.

For example, only certain manufacturers, products or product combinations can be made visible via product activation.

Under „Offer requested in portal“ you can see if the customer would like to receive an offer for a specific product in the end customer portal.

Questionnaire data

Whether you qualify the customer yourself or the customer fills out the lead route in the end customer portal: here you can see all the data recorded for your customer. If the „Product recommendations“ function is active, you can see in the CRM which products are recommended to the customer in the end customer portal.

Profitability calculation

Based on the customer's recorded data, the recommended minimum size of the solar system is displayed, including the profitability calculation. If the customer is offered several products, clicking on „Calculate savings with this product“ adjusts the profitability forecast to the respective product.

The screenshot shows the 'Produkttempfehlungen' section with the heading 'Empfehlungen anhand der Verbrauchsdaten.' It contains two identical blocks for 'Q Cells Solaranlage' with 'Watt: 345 | Module: 18 | kWp: 6.21'. Each block has a 'Produktdetails' link and a button labeled 'EINSPARUNG MIT DIESEM PRODUKT BERECHNEN'.

MINI-CRM.

A CRM in miniature for your sales agents

As described at the beginning, **LEVETO** works with a fully comprehensive customer relationship management (CRM) system. It turned out that many of our customers cooperate with sales representatives. This means that leads are qualified in advance and then passed on and processed externally.

The screenshot displays the LEVETO CRM interface. On the left is a sidebar with navigation options: Startseite, Dashboard, Montage, Ihre Leads, Lead Management, Archiv, Vertriebsgebiete, and Verträge/Daten. The main area is titled 'Anfragedetails' for a lead in Munich, accessed on 17.05.2023 at 10:56 Uhr. It shows the lead's name 'Anna Testlead', address, phone number, and email. A red button 'Lead reklamieren' is visible. Below this is a 'Leaddaten' section with a table of qualification data. To the right, the 'ANGEBOTE' section shows a table of offers with columns for action, AN Nr., AN Titel, Status, Widerrufsfrist, Auftragsbestätigung/Rechnungen, AN-Wert netto, AN-Wert brutto, Berater/Verkäufer, and Datum. Two offers are listed: one in 'Entwurf' status and another 'Angebot erstellt'.

Fragebogendaten LEVETO: PV Datenerfassung	
Photovoltaikanlage vorhanden	Ja
Installationsjahr PV-Anlage	2018
kWp Leistung PV	7,9
PV-Ertrag in kWh	6900
Interesse an Speicher	Ja
Realisierungszeitraum	Umgehend
PLZ	80804
Sonnenstunden in der Region	967
Personen im Haushalt	3
Stromverbrauch (p.a.)	4500
Monatlicher Abschlag	120
Aktueller Strompreis (pro kWh)	36

Aktion	AN Nr.	AN Titel	Status	Widerrufsfrist	Auftragsbestätigung/Rechnungen	AN-Wert netto	AN-Wert brutto	Berater/Verkäufer	Datum Erstellt
		Entwurf	Test Sven	?	Entwurf	34.694,00	34.694,00	LEVETO Testpartner	22.05.2023 14:57
	853	Test Solaranlage	✓	Angebot erstellt		34.694,00	34.694,00	LEVETO Testpartner	17.05.2023 11:03



Sales representatives are given access to the lead's qualification information. This means that you have the most important information about the customer and their electricity consumption behavior. You can also complain about leads if necessary.

You also have access to appointment scheduling, the field service intake form, the media library and the offer area. Sales representatives access your products. In other words, not the sales representative's own products, but your company's own product range. A price mark-up can be included.

The highlight, however, is that the sales representatives can appear with their own branding (stationery). They act or sell in their own name and do not appear as your company.

Otherwise, data can be recorded on site in the traditional way and, as is customary, offers can be prepared. You have insight into the activities of the commercial agent.

We make your work at the customer's site as easy as possible!



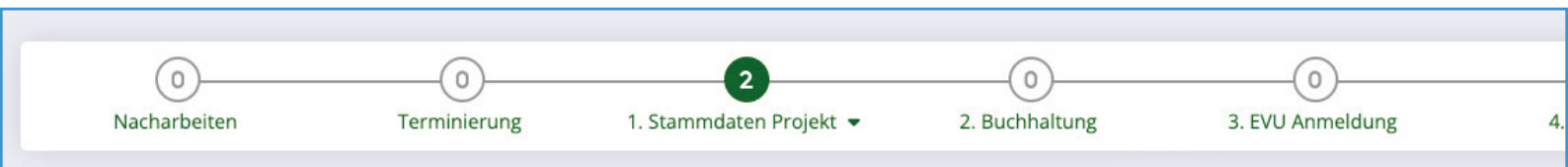
CRM TIMELINE.

Always know your customer's status



The CRM has a timeline which, in conjunction with the workflows, provides information about the current status or phase of the lead or customer. This is helpful to be able to provide the customer with information quickly when they call.

We will soon be publishing the option of making this timeline visible in the end customer portal. This will give your customer information on the current processing status from their perspective.



MEDIA LIBRARY.

Everything in one place, shared on request

We have long since arrived in the future and it is important today that several people can work on a project at the same time. Sharing documents and working on them at the same time is here to stay.

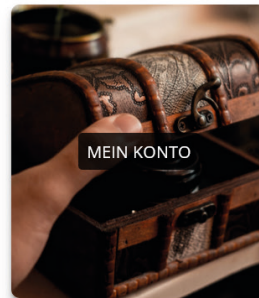
Although we at **LEVETO** are not yet able to offer the option of working on a document in parallel, it is possible to work together on a lead. In practice, this will rarely be the case, as one consultant will usually be responsible for a particular lead.

However, it is also very important to have all the documents for a lead together and ready to hand. This is what the shareable media library is for. You can theoretically do without local or network drives in your company, as all customer files in **LEVETO** can be stored in the media library. Although this will not be 100 % usable in practice, as

you will probably also carry out planning with PV Sol and use other programs or create Excel and Word documents, the media library is useful as a collection point for all lead-specific documents. This is mainly because the end customer only has access to folders defined by you. They therefore do not see everything that has been stored in the media library.

On the right you can see the welcome page of the end customer portal and how the media library appears to the end customer.

Willkommen in unserem Kundenportal!



KONTAKT








Residenzstraße 21
80333 München
Telefon: 089 / 21 54 03 77 00
E-Mail: info@eveto.de



Sicherheit mittels SSL-Verschlüsselung und DSGVO-konformer
Behandlung

Mediathek

In Ihrer persönlichen Mediathek finden Sie alle Fotos und PDF Dokumente, die Sie uns für Angebote und Wirtschaftlichkeitsprognosen zur Verfügung gestellt haben. Hier haben Sie die Möglichkeit diese Dateien zu verwalten oder zusätzliche Dateien hochzuladen.

-  Dach
-  Keller
-  Dokumente
-  Verträge
-  Korrespondenz
-  Baustellendokumentationen
-  DC-Montage Unterlagen
-  AC-Montage Unterlagen

Dach

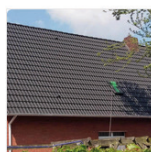
Neu

Eine Mediathek



hausdach 2.jpg

22.05.2023, 15:39 Uhr



hausdach.jpg

23.05.2023, 09:48 Uhr

Beschreibung
Dachgröße 15,0 x 8,50 meter



No WhatsApp,
no cloud,
no mails!

A media center with sharing via link

Flexible and modern media library for data exchange between advisor and customer. And also only internally from advisor to back office, if desired.

File formats

The media library allows you to upload any data format. From photos as a single file in common image formats such as JPG, PNG and similar, PDF documents, Excel files and video files are of course also possible. There is also a filter function that shows or hides image, video and document files.

Folder structure

We are accustomed to creating and deleting file folders and sub folders as we wish in standard operating systems. The new media library now makes this possible.

There are two different folder types. One type is only visible internally, the other folder type is internal and visible to the end customer. The different folder types are visually distinguishable from each other.

Sharing

„Sharing is caring“ and in **LEVETO** it is also possible to share the media library or parts of the media library as a link. To do this, there is a new window in which you enter a title and a description so that your recipient immediately understands what you want them to do. Then select which folders are to be shared.

In addition to the release of folders, workbooks, i. e. digital forms that you are familiar with from the field service intake form or the workflows (see topic field service function), can also be released. This means that external employees or your end customers, for example, can now complete the forms independently. Forms can also be displayed in the end customer portal.

It gets even better: The validity period of the release can be set. This means that access to the media library can be limited in time.

Forms

Free yourself from Fluentforms and Google Forms. With **LEVETO**, you can design your own forms and use them internally, externally, in the media library, in the end customer portal or on your company website.



SEVDESK.

Invoicing in sync
with LEVETO

LEVETO is an integration partner of sevDesk.

Create your partial, budget or total invoices quickly and easily in **LEVETO**.

Auf Benutzer wechseln: Leveto SU

Zentrale
Favoriten
Dashboard
Leads
LVT-Übersicht
Montage
Vertragsverwaltung
Bestellung
Netzbetreiber
Planung
Test-Workflow
Kalender
CRM
Kunden hinzufügen
Kontaktübersicht

ANGEBOTS- & AUFRÄGE
ANAB-Übersicht
ANAB-Prüfung
Aktive Aufträge
AC-DC Aufträge
Rechnungen
Finanzierungsanfragen

Rechnungen

Alle Rechnungen über 11.027,80 EUR: 8

Offene Rechnungen über 11.027,80 EUR: 8

Fällige Rechnungen über 7.763,80 EUR: 6

Bezahlte Rechnungen über 0,00 EUR: 0

25 Filter Tools Spalten Suche

1 bis 8 von 8 Einträgen

Aktion	Kunde	AN-Nummer	AB-Nummer	RE-Nummer	Titel	Datum erstellt	Rechnungsdatum	Status	Summe netto	Summe brutto	Versendet am	Zahlungsbestätigung versendet am	Fälligkeitsdatum	Bezahlt am
		771		RE-1012	Teilrechnung Nr. RE-1012 aus Auftragsbestätigung AB-1001	18.04.2023 15:49	18.04.2023 00:00	offen	1.632,00 EUR	1.942,08 EUR			02.05.2023	
		792		RE-1007	Teilrechnung Nr. RE-1007 aus Auftragsbestätigung AB-1009	14.04.2023 15:12	14.04.2023 00:00	fällig	652,80 EUR	776,83 EUR			14.04.2023	
		785		RE-1006	Teilrechnung Nr. RE-1006 aus Auftragsbestätigung AB-1006	13.04.2023 14:36	13.04.2023 00:00	offen	1.632,00 EUR	1.942,08 EUR			20.04.2023	
		777		RE-1005		29.03.2023 09:56	29.03.2023 00:00	fällig	2.448,00 EUR	2.913,12 EUR			29.03.2023	
		777		RE-1004	Teilrechnung Nr. RE-1004 aus Auftragsbestätigung AB-1004	29.03.2023 09:53	29.03.2023 00:00	fällig	1.224,00 EUR	1.456,56 EUR			29.03.2023	
		760		RE-1003		18.03.2023 15:47	18.03.2023 00:00	fällig	3.284,00 EUR	3.884,16 EUR	18.03.2023 15:47		25.03.2023	
		758		RE-1002		17.03.2023 14:53	17.03.2023 00:00	fällig	150,00 EUR	150,00 EUR	17.03.2023 14:54			
		754		RE-1001		17.03.2023 08:45	17.03.2023 00:00	fällig	25,00 EUR	25,00 EUR	17.03.2023 08:45		22.03.2023	



sevDesk

You can access typical accounting functions directly from **LEVETO**. This includes, as just mentioned, the creation of invoices in various forms. Of course, you can also send invoices directly from **LEVETO**.

But it is also possible to create and send reminders or, for example, payment confirmations by e-mail.

As a delicacy, there is also the automatic sending of reminders and confirmations.

TICKET SYSTEM.

Task distribution made easy


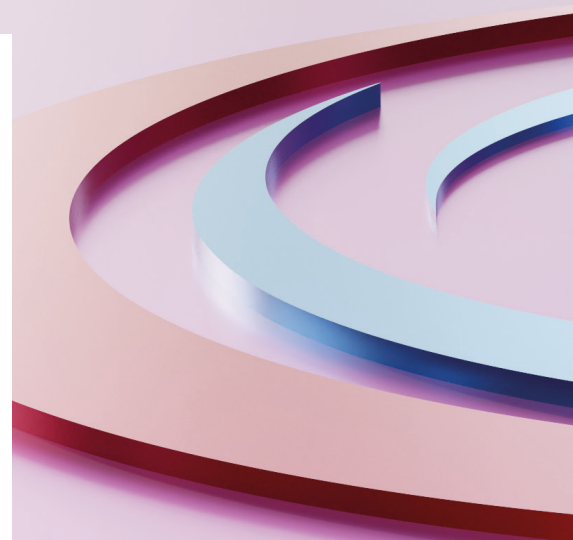
End customers often have queries or additional tasks. But what to do with these tasks? In such cases, **LEVETO** can help with its own ticket system.

You can have tickets generated automatically via e-mail inbox or create tickets manually. Tickets are assigned to e-mail addresses and thus to leads/customers. You can freely define different ticket types. For example, whether it is a support case or an administrative matter.

Of course, you will find the classic details such as time estimate, actual time required, due date, priority, user assignment and similar. However, we have a special case: tickets can be assigned to groups and not just to a fixed user.

Tags, status and the addition of subtasks to a ticket are, of course, integrated. Attachments can be uploaded.

When tickets are commented on, there is the option to send this comment by e-mail, including attachment, to the creator/customer. This makes the customer feel well looked after.



Yes, we know that LEVETO is different. We know that your employees have to adapt, have to change. We know that training is required.



However, your company will learn to fly with LEVETO!



If applicable lead management
via LEVETO CRM.

Optional

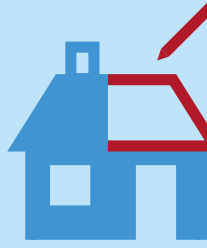
If applicable consulting
via LEVETO Portal.

Optional

If applicable offer creation
and sending via LEVETO CRM's
sales force module.

Optional

If applicable roof plan
via LEVETO CRM



Offer accepted

Technical
feasibility
check

Optional trigger:
incoming payment from
accounting software
sevDesk

Workflows are based on
digital forms.

These forms are filled out
by different departments,
checked, possibly sent,
edited, sent back to a
reviewer and then
accepted or rejected for
correction.

Visibilities to the work-
flows can be restricted so
that only the departments
or corresponding users
can see, edit or check
certain workflows.

When certain changes or
triggers are made, the user
is notified in LEVETO or
by e-mail.

Workflow
1. Project master data

General office staff:
processing.

General office staff
closes workflow.

Workflow
2. Accounting

Office staff
accounting:
processing.

Fills out
payment plans.

Creates (partial)
invoices*.

Saves.

General office staff
closes workflow.

Workflow
3. ESC
Registration

Office staff
ESC
department:
processing.

Office staff
ESC department
closes wf.

Workflow
4. Roof planning

Office staff
roof planner:
processing.

Uploads data.

Processes technical
feasibility.

Office staff roof
planner closes
workflow.

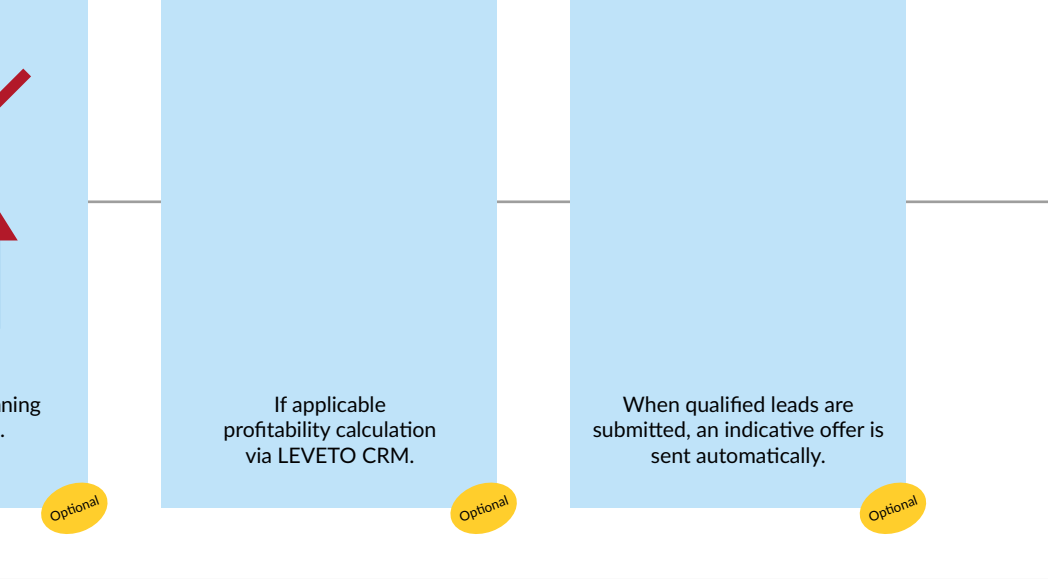
Workflow
5. Logistics

Office staff
logistics:
processing.

Orders
components and
commissions
forwarding agent.

Office staff
logistics closes
workflow.

*Further invoicing is still possible in the course of the process
and can be added with dependencies in other workflows.



PROCESS MAPPING WITH THE CRM SOFT- WARE

LEVETO

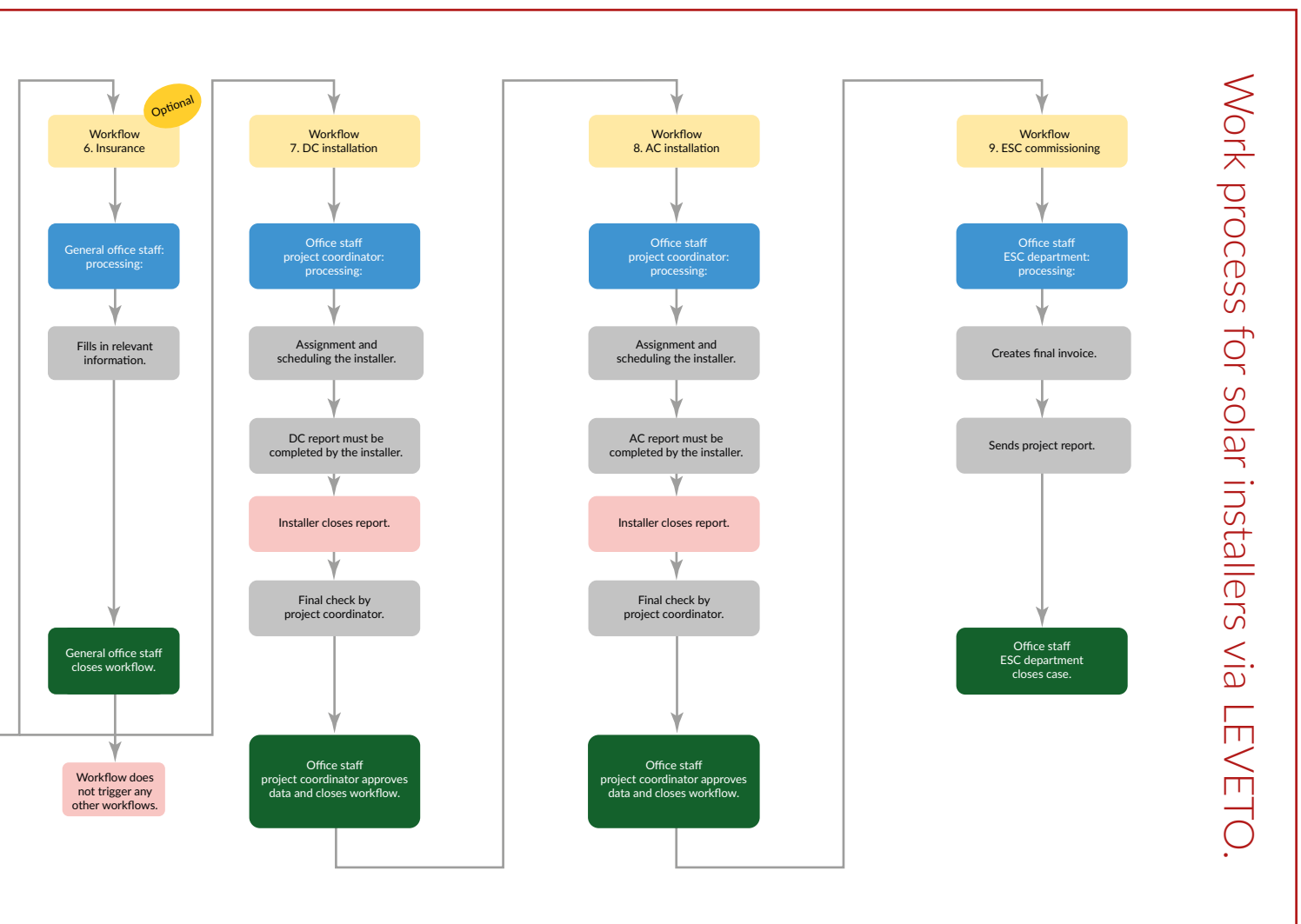
SOLAR
INSTALLER
EDITION

Workflows are visual
representations of
work processes.

Folders are forms.

Workflows and folders can be
individually created and set up
by you via the no-coding editor.

If a requirement is more complicated,
we will be happy to train your
employees or LEVETO support will
assist you with the setup.



Offer preparation

Create fully automated offers with just a few clicks during the consultation.

As all product data is stored in **LEVETO**, the offer can be created with a single click. Product details such as technical data sheets, profitability calculations or additional information can be automatically transferred to the offer.

A PDF is generated from the offer and the additional information, which contains a cover sheet with your welcome text. On your branded stationery, of course.

The offer can be sent directly to the customer by e-mail from the CRM or retrieved by the customer in the end customer portal. If the offer is viewed by the customer in the end customer portal, **LEVETO** informs you as soon as the customer has read the offer and if he accepts or rejects it.

Pos.	Opt.	Menge	Bezeichnung	Einzelpreis	Netto	
					Rabatt	Gesamtpreis
1		1 Stück	1 Monokristalline Hochleistungsmodule SENEC.SOLAR 375 Watt - 0.375 kWp	0.00	0.00	0.00
2		1 Stück	1 SENE.Home V3 hybrid 2.5	0.00	0.00	0.00
3		4 Meter	1 Solarkabel doppelt isoliert	0.00	0.00	0.00
4		2 qm	1 Unterkonstruktion (Würth, K2 oder S-Flex)	0.00	0.00	0.00
5		1 pauschal	1 Arbeitsschutzgerät und/oder Personenschutzmaßnahmen	0.00	0.00	0.00
6		1.66 qm	1 Anlagenmontage	0.00	0.00	0.00
7		1 pauschal	1 Anmeldung EVU	0.00	0.00	0.00
8		1 pauschal	1 Elektroinstallationsarbeiten	0.00	0.00	0.00
9		1 pauschal	1 Projektierung/Optimierung	0.00	0.00	0.00
Gesamtsumme netto						0,00 €
Eigene Gesamtsumme netto						15000 €

You can set individual prices or write a total price in the offer, which hides the individual prices.

LEVETO IN A NUTSHELL

LEVETO offers all processes from lead receipt, qualification, assignment to the sales force and scheduling to the consulting and sales process in one software. All processes can be individually adapted to your requirements. It takes less than two hours to familiarize yourself with **LEVETO**.

While you are advising your customer on the phone and have all your customer's data at a glance, you can display a presentation, product description or other documents to your customer in the end customer portal with a click and provide the appropriate explanation. With four clicks, you can create an individual offer from the stored offer templates and send it to your customer in real time via the end customer portal.

If your customer has already uploaded pictures of their roof to the media library, you can visualize their photovoltaic system with the **LEVETO** roof planner and amaze your customer, as they can immediately view the virtual roof layout in the media library. Of course, you can also insert the image into the offer.

Your customer can accept the offer via the end customer portal, and you can arrange an installation appointment straight away using the installation slots stored for your subcontractors or your own team. If your customer would like to meet you in person, you can arrange an on-site appointment at the click of a mouse to collect the signature in person.

Sales force services

LEVETO offers an optional additional function for the field service via a special questionnaire.

All relevant data and images can be recorded on site at the customer's premises using a tablet, and even on-site roof planning is child's play with **LEVETO**. The field service records the modules and additional products from the „product templates“ made available to them and saves them. Your office staff receives the information for the order check, sees the offer from the field service in draft mode and can correct it or approve it straight away. The

field service is informed in **LEVETO** when the offer is approved. Of course, the offer can be sent to the customer directly on site. Does your customer want an order confirmation immediately? No problem, the customer receives their order confirmation with just one click. Do you need a signature? They can do this on your tablet.

Another additional option for the field service: you transfer all order data, separated by AC/DC installation, to your planners or installation teams on site or in the car.

Wählen Sie eine Produktkonfiguration, welches Sie zur Angebotserstellung verwenden wollen.

Modulanzahl	Modultyp	Speicher
20	375 Watt SENEK Modul - {{kwp}} kW _p v	SENEC.Home V3 hybrid 5.0 v
Zubehör	Preis	
SENEC Wallbox v	18888	
Bitte volle Beträge ohne ,		
Anmerkungen		
Kunde freut sich auf eine schnelle Auftragsabwicklung		

Parameter für Energieauswertung

Dachform:	Dachbelegung (Ziegel):
-- Bitte wählen -- v	Dachbelegung (Ziegel)
Dachneigung (in Grad):	Dachausrichtung:
Dachneigung (in Grad)	-- Bitte wählen -- v
Sonnenstunden (max. 1100):	Stromkosten JÄHRLICH (in Euro):
Sonnenstunden (max. 1100)	Stromkosten JÄHRLICH (in Euro)

FOR SOLAR INSTALLERS.

Roof designer

Using **LEVETO's** roof planner, you can plan the customer's photovoltaic system during the online consultation. This is also possible on site at the customer's premises. Just show it to your customer virtually. If there are any deviations from your planning as a result of your consultation and, if necessary, additional modules are added, you can

adapt your offer at the touch of a button and make it available to the customer.

As the customer has stored photos of their building in the media library, the consultant can select an appropriate photo and make the plan.

Modulplatzierung

Bitte platzieren Sie die Solarmodule.

Optimieren

Sperrflächen auf dem Dach kennzeichnen!

Expertenmodus ☒ An

Alle an/aus

Zurücksetzen

Drehung

Aufständerung

W ↔ O

Ausrichtung

Neigung

140 °

42 °

Dachbegrenzung

0 cm


Modul Abstände

horizontal

vertikal

0 cm

0 cm



Ergebnis Ihrer Belegung

- Modulanzahl: 16
- Modulfläche: 29 m²
- Nennleistung: 5,92 kW_p
- Stromertrag: 5.420 kWh/Jahr

Hinweis: Nutzen Sie die Maus, um die Photovoltaikmodule auf dem Dach zu platzieren. Dazu empfiehlt es sich, zuerst die Optimierung zu starten und anschließend den Planungsvorschlag individuell anzupassen. Bitte beachten Sie, dass bei der Dachflächenauswahl nicht immer alle Aufbauten berücksichtigt werden können. Vergewissern Sie sich, dass keine Module auf Dachflächenfenstern platziert werden.

Once the consultant has chosen a photo, the roof end points must first be marked. The roof length and width are then entered. If the customer does not know the roof dimensions, these can be measured and transferred using „Google Maps“.

The number of modules to be installed on the roof, is taken from the offer and displayed in the roof planner. You can add further modules for the roof occupancy via a matrix. If the number of modules to be assigned is inadvertently exceeded or undercut, a message is displayed. If the number of modules differs from the offer, the offer can be adjusted by clicking on the different number of modules planned.

Various tools, such as controllers for the distance between the modules and the horizontal and vertical alignment of the solar modules on the roof, help with planning and visualization.

Assembly/designer workflow

LEVETO takes into account the process with external system planners and installers. Most solar system installers work with AC/DC installation folders. With an additional module, specially programmed for this purpose, **LEVETO** ensures a smooth and automated planner/installation workflow.

After the order confirmation, you can automatically distribute all relevant data for the installation of the solar system to your AC/DC teams at the click of a mouse.

The folder contains all relevant information about the customer and the property, as well as the planned installation date. The installation teams can be connected to **LEVETO** with their own access to gain access to all the necessary data and to update images from the construction site.

PDF erstellen/prüfen

PDF versenden

Kundendaten
Max Mustermann
Musterstraße 123
12345 Musterstadt
m.mustermann@mail.com

Übergabe der Mappe an
Solaranlagenverbauer GmbH
Musterstraße 231
12345 Musterstadt
muster@solaranlagenverbauer.de

Lieferant
Solaranlagenverbauer GmbH

Freigegebene Bildgalerien
DC-Montage, AC-Montage, Vollmacht, Auftrag

Optionaler Zusatztext
Optionale Zusatzinfos

3 enthaltene Positionen
Werden ohne Preisangaben an den Monteur übermittelt

20.00	Stück	375 Watt SENEK Modul - {[kwp]} kWp
1.00	Stück	SENEC-Home V3 hybrid 5.0
1.00	Stück	SENEK Wallbox

Kundenmediathek

DC-Montage
Fotos
Foto hochladen

Es wurden noch keine Bilder hochgeladen.

PDF Dokumente
PDF hochladen

Es wurden noch keine PDF Dokumente hochgeladen.

AC-Montage
Fotos
Foto hochladen

Es wurden noch keine Bilder hochgeladen.

PDF Dokumente
PDF hochladen

Es wurden noch keine PDF Dokumente hochgeladen.

Parameter für DC-Monteur

Zählerplatz frei:
-- Bitte wählen --

Zählerzusammenfassung:
-- Bitte wählen --

Zählerplatz Bemerkungen:

Zählerzusammenfassung Bemerkungen:

Zähleranzahl:
Zähleranzahl

Internetanschluss:
-- Bitte wählen --
(wenn Nein ist der Kunde verpflichtet einen zu machen)

Bemerkungen Innendienst:
(z.B. Besonderheiten, Kundenwünsche)

Bemerkung Montage:
(Kabelweg, Zählerschrank, Grabungsarbeiten, Zwischenzähler, WR / Batterie Platz)

Bestandsanlage:
Bestandsanlage
(wenn ja, mit Inbetriebnahme, Anlagengröße und Anlagennummer)

Entfernung: PV-Module zu WR in Meter:
Entfernung: PV-Module zu WR in Meter

Entfernung: Wechselrichter/Speicher zu Zählerschrank:
Entfernung: Wechselrichter/Speicher zu Zählerschrank

Zählerort (Stockwerk):
Zählerort (Stockwerk)

Hausanschluss (HA) Ort:
Hausanschluss (HA) Ort

Speicher/WR Platz:
Speicher/WR Platz

Montagetermin:
Datum zurücksetzen

Infotext Monteur:

The installation and planning workflow described here is based on individually created and adjustable digital forms (folders), which can be linked together. In this way, all data can be collected within the large solar installation project and passed on as required.



The software solution for



Claims adjuster



Solar installers



Lead generators



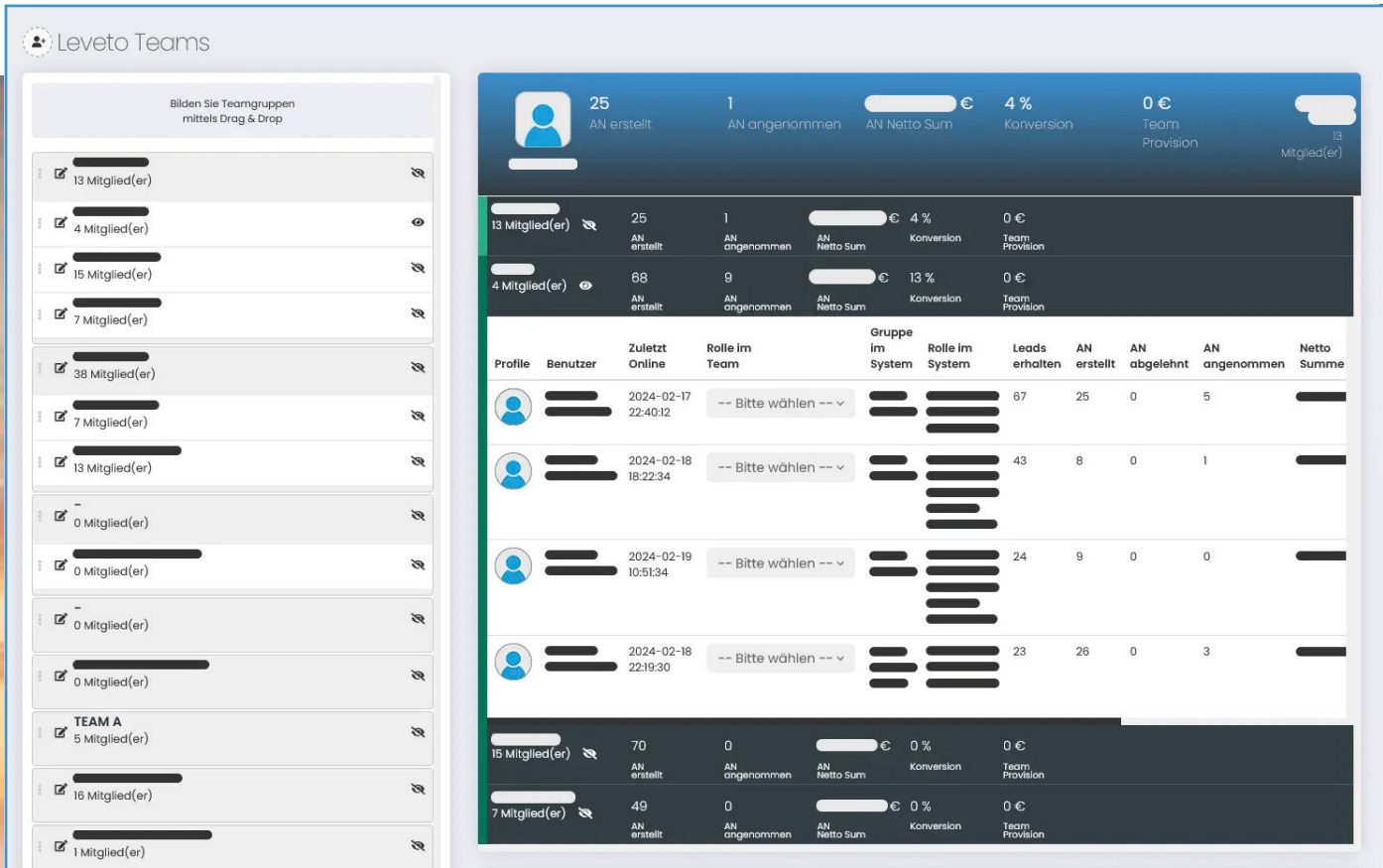
Physicians

TEAMS.

Commission and conversion per team and employee at a glance



„Competition is good for business.“



Example of the team overview with the team expanded. The green bar shows the team hierarchy.

LEVETO supports the organization of employees into teams. The teams program module visualizes employee affiliations and overviews of conversion and commission of teams, team members and team leaders.

The team assignments influence the view of leads. Several sub-teams can be managed in one team. The hierarchy is managed logically:

A team member only sees themselves. A team leader sees themselves and their team members. A team leader sees, for example, his appointments and the appointments of his team.

The ability to manage teams also introduces the frequently requested function for distributing commissions. This can be set per team member

and per team leader. **LEVETO** calculates the commissions from this and thus simplifies accounting and bookkeeping for the HR department.

With Teams, the performance of employees and the performance of teams can be easily read. The conversion rate is calculated from the number of leads assigned to the ratio of successful conversion into a paid order. **LEVETO** provides information about the success of an individual employee or the combined success of the teams working in the company.

This makes it possible to deduce who is probably more successful and why, and to further optimize sales by internal training.



WAREHOUSE.

No bottlenecks thanks to LEVETO's own inventory with API to external inventory management systems

With its warehouse management, **LEVETO** brings a long-desired function to the program. This makes it possible to track whether a certain number of items are available, whether an order can be started or whether items need to be reordered beforehand.

Several locations (storage locations) can be created. Items can be assigned to locations.

Stocks or incoming goods are entered in the article; this fills the stock list. As a result, **LEVETO** knows how many items are available per article (at which storage location). Warnings can be issued when a minimum stock level is reached.

LEVETO will reserve a quantity of goods based on the number of items on an offer using certain triggers.

In addition, there is a legally compliant inventory book which records the inventory manager, counter, recorder and storage location. For inventories that last several days, it is possible to interrupt the inventory and resume it later. Classic running lists are written digitally instead of on a clipboard. A summary can be printed out once the inventory has been completed.





Zentrale

Favoriten

Dashboard

Leads

TSE

Buchungssystem

LVT-Übersicht

Leadlieferant

ToDos

Preliminary examination

Product control

Feuerschaden

1 Contract signing

2 INSTALLATIONS DATEN

SYSTEM INSTALLATION

Neuer Lead

Reisekosten

Kalender

CRM

Produktverwaltung

Produkte & Leistungen

Kategorien

Produktimporter

Lager

Lohmar

LAGERNAME
Lohmar

ANSPRECHPARTNER
r

TELEFON

E-MAIL

STRAßE
0

HAUßNUMMER

PLZ
53797

ORT
0

Lagerbestand

Wareneingang buchen

Bestandsliste

Details

25

Filter

Tools

Spalten

Suche

1 bis 5 von 5 Einträgen

	ID	Artikelnummer	Neuestes Einlieferungsdatum	Ältestes Einlieferungsdatum	Produktname	Lagermenge Total	Lagermenge Reserviert
	Suche ID	Suche Artikelnummer	Suche NeuestesEinliefe	Suche ÄltestesEinliefer	Suche Produktname	Suche LagermengeTotl	Suche Lagerme
	43443		21.04.2022 18:31	21.04.2022 18:31		0	
	43528		28.04.2022 14:53	28.04.2022 14:53		0	
	43535		28.06.2022 14:55	28.06.2022 14:55		100	
	108	AZ00009	07.12.2023 22:05	07.12.2023 22:05	Azzurro ZCS Pylontech Steuerungsmodul	0	
	157	FX00012	22.12.2023 17:00	22.12.2023 17:00	Fox Ess Energymeter 3-phasig	10	

1 bis 5 von 5 Einträgen



Favoriten

Dashboard

Leads

TSE

Buchungssystem

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Produkte & Leistungen

Kategorien

Produktimporter

Inventurverwaltung

Lauflisten

Aktive Laufliste

Zusammenfassung

25

Filter

Tools

Spalten

Suche

1 bis 1 von 1 Einträgen

	Laufnummer	Status	Datum	Inventurlauf	Inventurleiter	Lager	Lagerplatz
	Suche Laufnummer	Suche Status	Suche Datum	Suche Inventurlauf	Suche Inventurleiter	Suche Lager	Suche Lagerplatz
	3	Abgeschlossen	12.02.2024 18:25	2024-02-12	Ejma Mujezin	test	4

1 bis 1 von 1 Einträgen

+ Inventurbuch erstellen

Nur der zugewiesene Mitarbeiter kann die Laufliste öffnen

Wenden sie sich an den Inventurleiter zur Zuweisung von Lauflisten

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PSC REGISTRATION

by LEVETO's partner

EVU NETZANTRAG 4U

We offer an all-in-one service for the complete PSC registration of all photovoltaic systems. We take care of the entire registration process so that you can fully focus on the installation and assembly.

Our experienced team knows all relevant regulations and ensures that your projects get through the power supply company registration process without any delays.

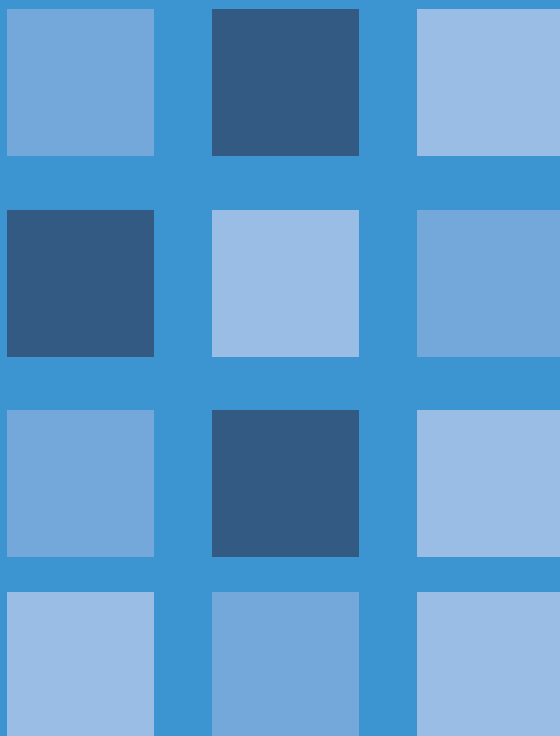


Visit us on

[EVU-NETZANTRAG-4U.DE](https://www.evu-netzantrag-4u.de)

K A N B A N

originates from Japanese and means “signal card”. The aim of the KANBAN philosophy is to achieve a steady, orderly workflow. Projects are divided into small steps or tasks and worked through one after the other. Each step should be completed first before moving on to a new step. Multi-tasking takes the form of several team members working on their own small tasks in parallel, with everything working together for the benefit of the big picture.



K

A

N

B

A

N

KANBAN.

Better visuals and simplified user guidance

Simplified

LEVETO has reached a stage where feature development can be scaled back. A milestone in clarity is the management board, which is ready for use but still under development, to output evaluations and statistics.

The next milestone is the KANBAN board. This provides users with a view that is familiar from many programs and makes it easier to keep track of leads. Mind you, with regard to the lead status.

Flexible

You can name the columns of the board as you wish:

- New lead
- Interested
- Call later
- Not reached
- Offer discussion
- Waiting for feedback
- Won
- Lost

Please bear in mind that these are the lead statuses in the company. Each column has a number under the heading. This allows you to quickly see how many leads are in this status. Previously, you had to call up the lead management table and filter. Dragging a lead tile into another column changes the status of the lead.

However, monitoring is running in the background. A new, unprocessed lead that does not have an offer cannot be dragged into the Offer discussion column.

Helpful information

You can display warnings on tiles and columns. For example, if a new lead is older than two days, the tile is marked at the edge with a colored bar and the word "Overdue".

Quality-of-life updates

To make life easier for the consultant and sales representative, each tile provides direct information about the lead. This makes it much quicker to find lead details. The import date and time, lead source and time of lead status changes are displayed. Contact details are immediately recognizable. A click on the lead address opens a map that shows the route from the employee's home zone to the customer. The assigned consultant is quickly visible to admins. Information on offers and order values is displayed. Lead appointments are easy to enter. The quotation editor can be started directly, workflows are displayed as squares in a line at the bottom. If there are entries for a lead in a workflow, the white squares at the bottom of the tiles become colored. A tooltip indicates the name of the workflow.

Shortcuts

Icons on the right-hand edge of the tile open functions associated with the lead. Among other things, you can switch to nine different CRM detail functions or to the questionnaire. Some functions do not open the detail page, but open in a pop-up window. The notes or the media library behave in this way, as do the Assign consultant function (which has a map showing the customer location and the consultant location) and Create resubmission. Some icons unfold the tile to provide space for additional information.

7. ENTSCHEIDUNG NOCH OFFEN

8. GEWONNEN



20 von 295



ÜBERFÄLLIG

Importiert: 27.06.2024 - 11:58 (WattFox)
Status gesetzt: 12.07.2024 - 17:17

☎
✉
📅
🔍

Berater

0 1 0,00 €

ÜBERFÄLLIG

Importiert: 01.07.2024 - 12:39 (WattFox)
Status gesetzt: 11.07.2024 - 16:50

☎
✉
📅
🔍

Berater

0 3 0,00 €



20 von 590



Importiert: 28.05.2024 - 13:53 (WattFox)
Status gesetzt: 09.07.2024 - 09:32

☎
✉
📅
🔍

Berater

0 1 0,00 €

Netz(vor)anmeldung

Importiert: 30.05.2024 - 08:02 (Telefonzentrale)
Status gesetzt: 03.07.2024 - 18:59

☎
✉
📅
🔍

Berater
Gewonnen am 03.07.2024 - 18:59

0 3 24.799,00 €

Netz(vor)anmeldung

- LEVETO Support
- Zentrale
- Favoriten
- Dashboard
- Leads
- LMT Kanban
- Teams
- Provisionen
- ToDos
- Auftragsdaten
- Buchhaltung
- EVU Anmeldung
- Planung
- AC und DC
- Warenversand
- DC - Montage
- AC - Montage
- EVU Inbetriebsetzung
- Kalender
- CRM
- Produktverwaltung
- Partner
- Profile

LMT Kanban

NEUER LEAD	5X TELEFONISCH NICHT ERREICHT	INTERESSIERT	KUNDENTERMIN VEREINBART
5 von 5	3 von 3	5 von 5	21 von 21
<p>Neuer Lead</p> <p>Tina Turner Importiert: 06.05.2024 - 14:32 (Kunden/Interessenten) ☎ 02345678910 ✉ tina.turner@beispiel.com Eigentümer: Ina Innendienst 📅 07.05.2024 📄 2 📊 0,00 €</p> <p>Sanja Sonne Importiert: 06.05.2024 - 15:03 (Solaranlagen) ☎ 02346789101 ✉ sanja.sonne@beispiel.com Eigentümer: Ina Innendienst 📅 07.05.2024 📄 0 📊 0,00 €</p> <p>Mike Batt Importiert: 04.05.2024 - 11:23 (Solaranlagen) ☎ 023478910112 ✉ mike.batt@beispiel.com Eigentümer: Ina Innendienst 📅 07.05.2024 📄 0 📊 0,00 €</p>	<p>Wolfgang Ambros Importiert: 28.04.2024 - 10:38 (Solaranlagen) ☎ 023489101123 ✉ wambros@beispiel.com Eigentümer: Ingo Innendienst 📅 07.05.2024 📄 0 📊 0,00 €</p> <p>Christian Schwarz Importiert: 28.04.2024 - 10:38 (Kunden/Interessenten) ☎ 023491012486 ✉ c.schwarz@beispiel.com Eigentümer: Ingrid Innendienst 📅 07.05.2024 📄 0 📊 0,00 €</p> <p>Thomas Borchert Importiert: 28.04.2024 - 10:43 (Kunden/Interessenten) ☎ 02345678910 ✉ tom.borchert@beispiel.com Eigentümer: Ingrid Innendienst 📅 07.05.2024 📄 0 📊 0,00 €</p>	<p>Signe Toly Anderson Importiert: 21.04.2024 - 09:33 (Solaranlagen) ☎ 02345102030 ✉ stoly@beispiel.com Eigentümer: Ingo Innendienst 📅 07.05.2024 📄 0 📊 0,00 €</p> <p>Win Butler Importiert: 21.04.2024 - 07:12 (Solaranlagen) ☎ 02345223344 ✉ wbutler@beispiel.com Eigentümer: Ina Innendienst 📅 07.05.2024 📄 0 📊 0,00 €</p> <p>Sally Barker Importiert: 20.04.2024 - 17:11 (Solaranlagen) ☎ 0234534445467 ✉ sallybarker@beispiel.com Eigentümer: Ina Innendienst 📅 07.05.2024 📄 0 📊 0,00 €</p>	<p>Allan Testmann Importiert: 20.04.2024 - 19:33 (Solaranlagen) ☎ 02345506070 ✉ at@beispiel.com Eigentümer: Ingo Innendienst 📅 07.05.2024 📄 2 📊 23.436,00 €</p> <p>Tia Carrere Importiert: 19.04.2024 - 13:54 (Solaranlagen) ☎ 0234544455562 ✉ tc@beispiel.com Eigentümer: Ina Innendienst 📅 07.05.2024 📄 0 📊 0,00 €</p> <p>Michael Müller Importiert: 19.04.2024 - 11:33 (Interessenten/Kunden) ☎ 0234555667789 ✉ michael.mueller@beispiel.com Eigentümer: Ina Innendienst 📅 07.05.2024 📄 0 📊 0,00 €</p>

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LEVETO GmbH

Sonnenstraße 20a

80331 München

E-mail: info@leveto.de

Website: www.leveto.de

Phone: 089 / 215 403 77 00