

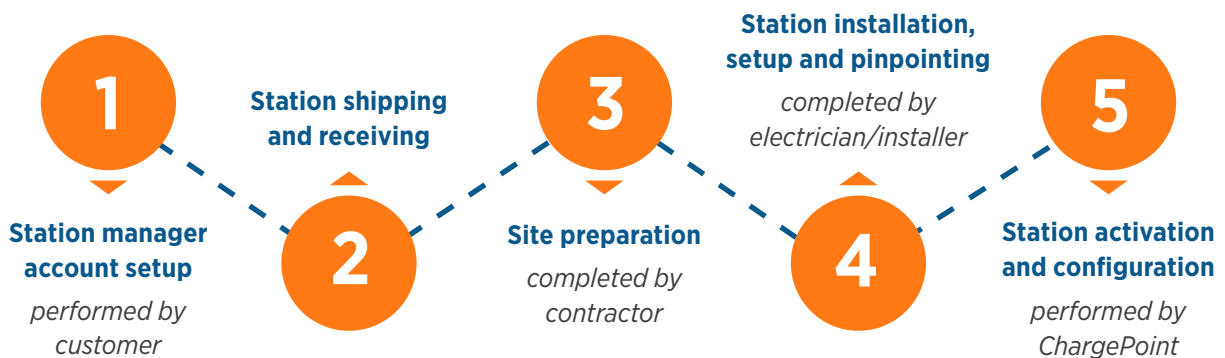
Getting Started with ChargePoint

For New Customers, Installers, and Resellers

How to ensure successful deployment of new ChargePoint EV charging stations and software.

Thank you for choosing ChargePoint! We're excited to help you get charging and join the e-mobility revolution. There are several important tasks to complete after buying charging stations and before the first successful charge. Here's what needs to happen (and who will be involved).

NOTE *Activations and onboarding is the main point of contact for each station implementation.*



1 **Station manager account setup** *performed by customer*



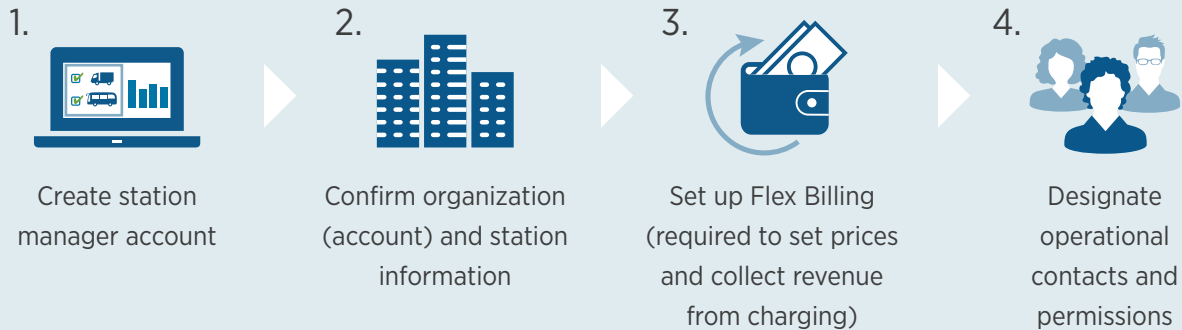
A ChargePoint station manager account is required to configure and manage settings such as cost to charge and who can access stations, as well as report on station utilization, energy costs, greenhouse gas emissions avoided, and more.

The contact information for the station manager should be provided to ChargePoint when stations are ordered. If this contact is not provided, our Activation and Onboarding team will work with the reseller and/or installer to identify the best contact.

New station managers will receive an email from notifications@chargepoint.com with an invitation to create a station manager account. Station managers should follow the link and complete these steps.

NOTE

This account must be set up before stations will be able to charge vehicles.



2 Station shipping and receiving

Once ChargePoint stations ship, the receiving contacts for the account receives email notifications. There are a few things to note about the shipping process:



- + Stations may arrive in different boxes and on different dates
- + Resellers may ship stations along with other items needed for site preparation
- + Software cloud plans, Assure plans and activation services are delivered digitally (there is no physical shipment)

3 Site Preparation

completed by the contractor



Proper site preparation requirements vary by product. Preparation is crucial to successful installation. Stations may not function properly if guidelines are not followed.

NOTE *Improper site preparation often leads to station malfunction, permitting failure and safety risks.*

Contractors should refer to the appropriate Site Design Guide for each solution (available through [ChargePoint University](#)) to find:

- + Site layout best practices
- + Pedestal mount concrete pad and wall mount surface requirements
- + Civil and electrical engineering requirements
- + Cellular communication requirements (these must be met for charger to function properly)

4 Station installation, setup and pinpointing *completed by the installer*



The installation process will be slightly different depending on whether it's handled by ChargePoint, a ChargePoint partner, a certified installer or electrical contractor new to ChargePoint.

Installation purchased from ChargePoint

If station installation services (Install-Valid, Install-Commissioning) or ChargePoint as a Service (CPaaS Subscription) have been purchased from ChargePoint, ChargePoint Field Services must confirm site readiness prior to station installation. To request confirmation after the site has been prepared, submit a completed construction signoff form with required photos to installdispatch@chargepoint.com.

When ChargePoint receives the necessary documentation showing that the site is ready for install, we will dispatch a ChargePoint O&M to complete the installation and validate or commission the site.



Installation completed by a ChargePoint partner, certified or new installer

The installation process varies for each ChargePoint product.

NOTE *All electricians must complete product-specific ChargePoint certification to set up a ChargePoint installer account.*

Installation completed by a ChargePoint partner, certified or new installer (cont.)

A ChargePoint installer account is required in order to install and pinpoint stations so they can be configured for operation. Installers must complete the training and set up an account before going onsite for installation. Installers will not be able to complete the installation without an installer account. Station owners may wish to complete certification as well.

Certification

*(installers must complete before going onsite;
station owners may wish to complete certification as well)*

- + Register at chargepointuniversity.com.
- + Complete the appropriate training course.
- + Download appropriate installation guide.
- + Receive an email invitation to create an installer account.
- + Set up installer account prior to going onsite for installation.

Installation and pin pointing

(installers will complete onsite)

Certified installers must follow the installation instructions for each station. After the stations are physically installed, the installer must energize each station, log in to their installer account and pinpoint each station location using the station MAC address.

NOTE

When unpacking materials, installers should keep an eye out for any labels that will be added to stations. Installers will give station owners the MAC address label for each station installed.

Commissioning

All DC fast charging products require ChargePoint-managed commissioning following installation. ChargePoint will schedule managed commissioning at the same time if told 2 weeks prior to station installation.

NOTE

ChargePoint OnRamp products (hardware from other manufacturers) may require unique commissioning. Contact your sales rep for details.

5 Station activation and configuration

performed by ChargePoint Onboarding/Activation team



ChargePoint stations must be activated and configured using a ChargePoint station manager account before they will be operational. Activations and Onboarding will coordinate with the station manager to gather:



Ongoing admin, service renewal and on-site support contact for the station



Station MAC addresses and names (should be provided by the installer)



Who should be able to view and use the stations



Any videos or imagery to display on the stations



Hours of operation



Pricing policy (Flex Billing setup is required to collect revenue)

TIP

Installers will provide the MAC address during the installation process.

Once the stations have been activated, station managers can log in with their ChargePoint account to make changes to the configurations at any time.

Post-installation support

View [frequently asked questions for station owners](#) for additional support getting started with EV charging.

Thanks again for choosing ChargePoint!

