-chargepoin+.

Collect Payment for Station Use

Introduction

This guide describes how to collect payment from drivers for the use of your stations. You can set one price for all drivers, or you can set a discounted price for a group of drivers (such as your residents, customers, or employees) and another price for the general public. ChargePoint collects the money from the drivers and deposits it in your bank account once per month.

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Before You Begin

You need this banking information:

- Your federal tax ID or Social Security number
- Your bank's name and address
- Your ABA Routing Number (IBAN for non-USA) and bank account number

Consider your pricing plan and how many Driver Groups will receive a discounted price:

Distinct Prices	Steps for Distinct Pricing
1	If everyone will pay the same price, go to the section Set Pricing on Your Stations.
2 or more	For example, one price for customers or employees and one price for the general public:Set up ChargePoint Connections for each group who will get a special price.

If some of your stations will have a different pricing strategy than other stations, you may find it convenient to configure one or more Custom Station Groups. For details, see the *Setup Station Groups* How To guide.

If you want the proceeds from different groups of your stations to be deposited into different bank accounts, you will need to configure one or more Custom Station Groups first. For details, see the *Setup Station Groups* How To guide.

Once you have completed these tasks, you can begin to set up pricing.

Enroll in Flex Billing

Many customers enroll in Flex Billing at the time they set up their Organization's account. If you are not yet enrolled, you can enroll by following the steps in this section.

If you want the proceeds from different groups of your stations to be deposited into different bank accounts, see *Multiple Remittances (Custom Group Overrides)* once you've completed the steps in this section.

Enable Flex Billing

- 1. Log in to ChargePoint and click **Organizations**.
- 2. Click anywhere inside the **Org Name** field of the item you want to view or edit
- 3. Click View/Edit Organization.

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- 4. Click Flex Billing.
- 5. Click Activate.
- 6. Fill out all **Subscriber's Information** fields.

Double-check all your information is accurate.

Click **Submit** at the bottom.

The form is submitted to ChargePoint and your Flex Billing status changes to *Pending*.

If editing is needed, click Update.

Confirm Flex Billing is Enabled

 When Flex Billing has been approved for your organization, you will receive an email confirmation from ChargePoint and your Flex Billing status will change to **Enabled**.

Note: It may take 2–3 business days for Flex Billing to be approved.

Once Flex Billing is enabled, you can set pricing for your stations.

Set Pricing on Your Stations

Setting up pricing is a three-step process:

- 1. Create pricing rules to define how much drivers pay.
- 2. Create a pricing policy to define which pricing rules apply to which drivers.
- 3. Apply the pricing policy to your stations.

Create Pricing Rules

These steps describe how to set up per-hour pricing that varies by time of day for a custom driver group—in this case, free charging for loyalty card holders during business hours, 25¢ per hour after business hours. However, options for alternative scenarios are also included. Create the pricing rule you require by adjusting the settings shown in the examples to meet your needs.

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Note: You will need to repeat these steps for each driver group to which you want to assign unique pricing.

- Log in to ChargePoint, and click Stations > Pricing and Reservations.
- 2. Click Create Pricing Rule.
- 3. On the **Getting Started** page, select your:
 - Organization type
 - Country where the station is
 - State where the station is
- 4. Click Next
- 5. Enter your rule **Name** and your **Organization** name.

Rule names can describe an audience (Employees, Visitors, Customers, etc.) or time of day (Before work, During work, After work, Weekends, etc.) or any other aspect to distinguish between rules.

- 6. Select your Station type.
- 7. Click Next.
- 8. Select either:
 - ChargePoint Recommended for best practice pricing, then click Next and go to Step 39.
 - Advanced to create your own, then click Next and go to Step 9.
- 9. For **Energy Pricing**, select the pricing model for actively charging vehicles, either:
 - Free click Next and go to Step 18.
 - Fixed price go to Step 10.
 - Vary price by time of use go to Step 13.





10. For Energy Pricing > Fixed price, enter an amount.

The green bar on the bottom shows you how your price compares to gas prices; you can click on the **Gas: \$x.xx** price to see how that price is calculated.

- **11.** Enter a quantity to charge by:
 - per kWh (default if kWh pricing is allowed; otherwise, per hour is the default)
 - per hour *
 - per minute *
 - * Prices apply only while the vehicle is actively charging.
- 12. Estimated costs are listed in the dropdown.

Click Next and go to Step 18.

- For Energy Pricing > Vary price by time of use, select the day or days.
- **14.** Slide the start and end times for the time range you want to specify.
- 15. Enter an amount to charge per kWh.
- To add another set of days, times, or dollar amounts, click + Add Hours.

To make a time interval free, simply do not define that time period.

 Estimated costs are listed in the dropdown and provide a preview of what the ChargePoint mobile app shows.

Click Next and go to Step 18.

 Optional. The Station Parking option to charge fees while the vehicle is plugged in can be turned on by clicking the Off button.

If you turn this **On**, you can customize how the parking fee should vary and when it applies by the **Until** dropdown list:

- Time limit exceeded, go to Step 19.
- Driver ends session, go to Step 23
- Vehicle stops charging, go to Step 25.
- Vary price by time of use, go to Step 28.

To skip this, click **Next** and go to Step 33.



Getting Started > Name your rule >		Energy	Parking	Min / Max	Summary		_
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						All prices in U.S. I	Dollars (USD)



- 19. For Station Parking > Time limit exceeded, enter an amount in the Parking Fee field for the cost of parking there per hour before the time limit is exceeded.
- 20. In the **Overstay** field, enter the cost of parking after the time limit.
- **21.** Specify the time limit before the higher price starts.
- 22. Click Next and go to Step 33.
- 23. For Station Parking > Driver ends session, enter an amount in the Parking Fee field for the cost of parking per hour for as long as the vehicle is plugged in.
- 24. Click Next and go to Step 33.
- 25. For Station Parking > Vehicle stops charging, enter an amount in the Parking Fee field for the cost of parking per hour while the vehicle is charging (and during the grace period).
- **26.** Enter an amount in the **Overstay** field for the cost of parking after fully charging.

Select either **per minute** or **per hour**.

Select the number of **Grace** minutes to wait from the time the vehicle is full until the overstay costs begin.

- 27. Click Next and go to Step 33.
- 28. For Station Parking > Vary by time of use, select the day or days for your rule from the dropdown list.
- **29.** Drag the starting and ending points for the time range this rule applies.
- **30.** Enter a price for that time range.
- **31.** Click **+ Add Hours** to specify additional days or hours.
- **32.** The dropdown menu shows price estimates for each number of hours.

Click **Next** and go to Step 33.



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- **33.** *Optional*. These options can be turned on by clicking their **Off** button:
 - Maximum Fee (details at Step 34)
 - Minimum Fee (details at Step 35)
 - Flat Fee (details at Step 36)

Or skip these by clicking **Next** and go to Step 38.

- **34.** *Optional.* **Maximum Fee** is a limit to the amount it costs each time a car plugs in (per session) or a limit per a certain number of hours from the dropdown list.
- **35.** *Optional.* **Minimum Fee** is the amount it costs each time a car plugs in, regardless of the time length.
- **36.** *Optional.* **Flat Fee** is the amount it costs for each time-length selected from the dropdown list. Use this to charge a fixed amount per plug-in, or a fixed amount per the indicated time period. Unlike Parking fees, this Flat Fee is not pro-rated.
- **37.** The dropdown menu shows price estimates for each number of hours.

Click Next and go to Step 38.

 On the Summary page, review all the information. If everything looks correct, click Save and go to Step 40.

If you wish to edit any item, click **Previous** as many times as you need to return to the page with the item you wish to edit.

- **39.** The recommended **Energy Price** screens you will see are a function of:
 - Where you are,
 - Your type of chargers (AC or DC),
 - and the vertical you specified.

After you enter a cost per kWh, the equivalent of a gallon of gas is displayed.

To enter a Station Parking cost, click **Off** to enter the cost either **per hour** or **per minute**, and then select the number of grace period hours from the dropdown list.



Getting Started > Name your rule > Pricing > Energy > Parking > Min / Max > Summar	y
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penois must match. Minimum Fee optional	6.64 est. for 2 hrs
Set a fixed session fee for every plug in, regardless of the session length.	
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	All prices in U.S. Dollars (USD)



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The energy cost is based on the average commercial rate in California. If your rate is different, update the price.		
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Level 2 charging stations add up to 25 miles of range per hour.		

40. Your pricing rule has been saved.

A reminder of the next steps will be displayed on this final screen.

Next Steps Your pricing rule has been saved. Follow the instructions below to apply this pricing rule to 12 stations in California 1. Go to the Manage Stations tab and create a pricing policy 2. Assign this rule to specific Drivers or All Drivers in the pricing policy 3. Apply the pricing policy to the appropriate stations

Create a Pricing Policy

Your next step is to create a pricing policy that defines to whom each pricing rule applies.

- Log in to ChargePoint and click Stations > Pricing and Reservations > Pricing Policies > Create Pricing Policy.
- 2. Enter a unique **Policy Name** and add a brief **Description**.
- **3.** Enter your **Org Name**, if it has not already been entered for you.
- 4. Reservations can be either:
 - **Disabled** If reservations are not required, and drivers can use any available station at any time.
 - Required If you require drivers to make a reservation to use stations where this pricing policy applies.

Note: Reservations set to *Required* in a pricing rule, must be *Required* in the pricing policy also.

If everyone pays the same price, then go to Step 6.

If you want to configure different prices for different driver groups or fleet, go to Step 5.

- From the Driver Group dropdown list, select the group of drivers or fleet you want. For example, loyalty card-holders.
- 6. From the **Pricing Rule** dropdown list, select the new pricing rule you just created.





7. For **All Other Drivers**, select the pricing rule you want to apply.

You may need to create a new rule for this driver group, if you have not already.

- Optional. If you have more than one custom driver group (for example, Employees) that you want to add to this policy, click Add Driver Group, then select the group name and pricing rule you want to apply to it.
- 9. Click **Save**. The new policy appears in the Pricing Policies list.

Apply a Pricing Policy to Stations

The last step is to apply your new pricing policy to some or all of your charging stations.

- Log in to ChargePoint and click Stations > Pricing and Reservations > Apply Pricing.
- Click the arrow ▷ on the left side of the Org Name to find the station(s) you want by expanding either Custom Groups or Radio Groups.
- If you require drivers to make a reservation to use stations where this pricing policy applies, in the Set Reservations column, select Required. If reservations are not required, in the Set Reservations column, select Disabled.
- In the Set Pricing Policy column, select your new pricing policy from the dropdown list, which changes depending on your Set Reservations selection:,

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(no selection)	The only available pricing policy will be <i>Free</i>
Required	Only pricing policies that require reservations appear in the dropdown list.
Disabled	Only pricing policies that do not require reservations appear in the dropdown list.

Note: You can apply the new pricing policy to individual stations (for example, "ChargePoint / HQ14") or to all of your stations ("ChargePoint Headquarters") instead of to a group of stations.

Note: If you get a message that your station software requires an upgrade to support your pricing policy, follow the online instructions to send a request to the ChargePoint team to request an upgrade

 Click Apply. Once the pricing policy has been successfully applied, a green check mark appears in the Status column.

Name	Current Policy	Set Reservations	Set Pricing Policy	Status		I
ChargePoint Headquarters	Free	◎ Disabled ◎ Required	< Select Policy >	×	Apply	1
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b ChargePoint Network HQ	Default Policy for All Drivers	Disabled Required	< Select Policy > 💌	V	Apply	1

Note: You can set pricing differently on

some stations versus others, by creating multiple pricing policies (and the corresponding pricing rules), and applying those policies, respectively, to the various stations (or groups of stations). For example, you can apply one Pricing Policy to the stations in one location while a different Pricing Policy to stations at another location.

Reference

Edit or Delete Pricing Rules

- Log in to ChargePoint and click Stations > Pricing and Reservations > Pricing Rules.
- Click anywhere in the row of the item you want to modify or delete, then select either View/Edit... or Delete... from the pop-up menu.

Changes you make to a pricing rule are automatically applied to any policy that uses the rule and to any station that rule applies.

Edit or Delete Pricing Policies

- Log in to ChargePoint and click Stations > Pricing and Reservations > Pricing Policies.
- Click anywhere in the row of the item you want to modify or delete, then select either View/Edit... or Delete... from the pop-up menu.

Changes you make to a pricing policy are automatically applied to any policy that uses the policy and to any station that policy applies.

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Multiple Remittances (Custom Group Overrides)

You can direct the proceeds from all stations in a particular custom station group to a different place (for instance, a different bank account) by adding a Custom Group Override.

You can also add a Custom Group Override that directs proceeds from a particular custom station group to the *same place* as another group or the Organization Default for keeping track of proceeds generated by a particular group of stations. When you create a Custom Group Override using the same banking information that has already been approved for your organization, the Override is enabled immediately—no additional approval is required.

Note: Flex Billing must be enabled before you can add a Custom Group Override.

Additionally, you must have at least one custom station group defined on ChargePoint. (To create a custom station group, click **Stations > Create Group**.)

To add a Custom Group Override:

- 1. Log in to ChargePoint and click **Organizations.**
- Click anywhere in the row of the item you want to add the Custom Group Override, then select View/Edit... from the pop-up menu.
- 3. Click Flex Billing.
- 4. Click Add Custom Group Override.

Note: The Add Custom Group Override button is only available after Flex Billing has been enabled.

5. From the dropdown list, select the custom station group you want.

Note: Only whole groups can be selected, not individual stations.

6. Click Activate.

The Activate Flex Billing form opens.



Flex Billing		5										
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- 7. From the **Remit To** dropdown menu, select one of these options:
 - Select Create New Remittance ID to set up a new remittance process for a particular custom group of stations. Do this to direct proceeds from the station group to a different bank account than the one used as the Organization Default.
 - Select a Remittance ID that is already enabled for one of your other groups to direct the proceeds to the same bank account as that group. For example, selecting HTCOFB01 would direct the proceeds for the Northwest Location custom group to the same bank account as the Organization Default.
- If you select an existing Remittance ID, you only need to click Submit. The new Custom Group Override is immediately enabled.

If you select *Create New Remittance ID*, the complete Activate Flex Billing form opens. Fill out the form—it must be fully complete. Double-check all of your information to ensure that it is accurate and then click **Submit**.

The form is submitted to ChargePoint and your Flex Billing status for that custom group changes to *Pending*. You can edit the form if necessary by clicking **Update**.

 When the Custom Group Override has been approved, you will receive an email confirmation from ChargePoint. Your Flex Billing status for that group will also change to *Enabled*.



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Bhowing 1 to 2 of 2 entries												

It may take 2–3 business days for the Custom Group Override to be approved. All payments received by the stations in the custom group after the Override is approved are handled according to the new remittance format. (Payments received by stations that are not in the custom group are handled according to the Organization Default Flex Billing settings.)

You can set up multiple Custom Group Overrides for your organization, but any single individual station can be a member of only *one* custom station group that has an Override for Flex Billing.

Also, keep in mind that if you add or remove charging stations from a custom group that has an Override for Flex Billing, you also redirect their revenue. For instance, removing a charging station from the custom station group *Northwest Location* shown in the figure above redirects that station's revenue from the group's Override remittance settings to the Organization Default Flex Billing settings on the 1st of the next month.

Edit or Delete Your Banking Information

For an existing Custom Group Override, you can make any of the following changes by clicking its **Update** button:

- Change the banking information (for instance, an account number) for the Remittance ID currently assigned to that Custom Group Override.
- Select a different Remittance ID (one that has already been approved for your Organization), if you want to redirect the proceeds for that Custom Group Override to the same bank account or remittance check as another group.
- Create a new Remittance ID, if you want to set up a new bank account or check process (one that is not already configured for any of your other Custom Group Overrides).

For example, there are three options available in the **Remit To** dropdown menu (compared to only two options—'Create New Remittance ID' and 'Organization Default'—that were available the first time you created a Custom Group Override on page 12). If you have multiple existing Remittance IDs, they will all appear in this list.

When you are finished editing the form, click **Submit** to resend it to ChargePoint.

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Cancel	<pre><select> Create New Remittance ID Select existing Remittance ID: HTCOFB01 (Organization Default)</select></pre>	ubmit				



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