

Account Setup

Getting Started Guide

Gather Essential Information

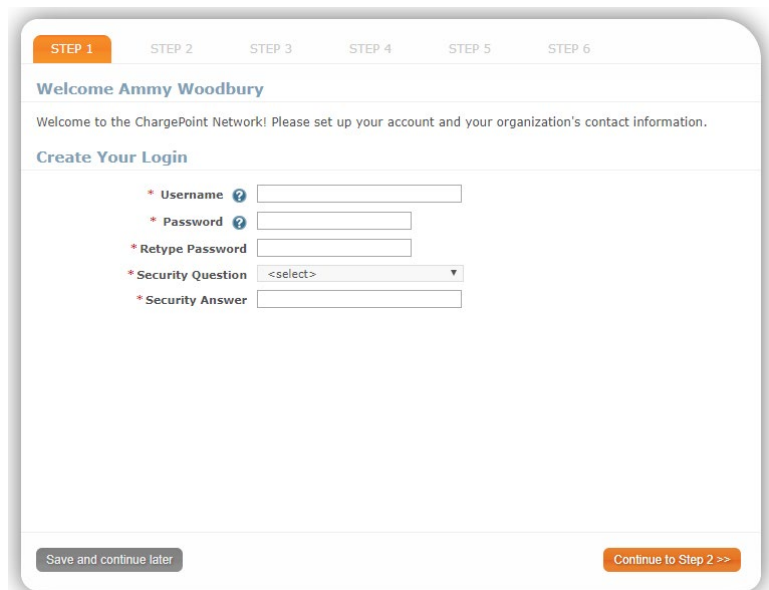
Congratulations on your new charging station! To get started, we need to know a little more about your organization. To create your account, you will need this information:

- Contact information (name, phone number, and email address) for individuals in your organization who will be involved in
 - Receiving payments from your stations (Flex Billing)
 - Station network administration (System Admin)
 - Accounts payable (Cloud Plan Renewals)
 - Driver Feedback
 - Maintenance Feedback
 - Other administrative notices and new system features
- Legal name of your organization
- Federal Tax ID (or SSN) for the subscriber
- Bank account information for the account where payments should deposit
 - Bank Name
 - Bank Address
 - ABA Routing Number
 - Bank Account Number

Create Your Account

Once you have gathered this information, click the link in your email to step through the setup wizard.

1. Select a username. We recommend using your email address.
2. Select a password. Your password must include:
 - 6-32 characters
 - At least 2 numbers
 - At least 1 letter
 - No spaces
3. Retype the password to verify it is typed correctly
4. Select a Security Question from the list.
5. Enter your answer to the security question.
6. Click **Continue to Step 2**.



The screenshot shows the 'STEP 1' of the account setup wizard. At the top, a progress bar indicates steps 1 through 6, with 'STEP 1' highlighted. Below the progress bar, the user is greeted with 'Welcome Ammy Woodbury'. A message states: 'Welcome to the ChargePoint Network! Please set up your account and your organization's contact information.' The main heading is 'Create Your Login'. The form contains five fields, each with a red asterisk indicating a required field: 'Username' (with a help icon), 'Password' (with a help icon), 'Retype Password', 'Security Question' (a dropdown menu currently showing '<select>'), and 'Security Answer'. At the bottom of the form, there are two buttons: 'Save and continue later' on the left and 'Continue to Step 2 >>' on the right.

7. Enter your contact information.

STEP 1 STEP 2 STEP 3 STEP 4 STEP 5 STEP 6

Enter your contact information

Role Network Manager

* First Name

* Last Name

* Email

* Address Line 1

Address Line 2

* Country

* State/Province

* City

* Postal Code

* Preferred Language

* Phone

Cell Phone

Fax

<< Back to Step 1 Save and continue later Continue to Step 3 >>

8. Click **Continue to Step 3**.

9. Enter your organization information. Most of the information is things you know, but there are two key fields:

- **Station Common Name:**
Every station in ChargePoint has a name, consisting of two components. One component is the Common Name. It is the same for all stations in your organization. In most cases, enter your organization's name. Abbreviate if necessary to fit in 15 characters.
- **Preferred Language:** Select the default language the station will display. (For stations with a display screen, station users can select an alternative language via the station interface.)

STEP 1 STEP 2 STEP 3 STEP 4 STEP 5 STEP 6

Tell us about your organization

* Org Name

* Station Common Name (15 characters left) (Do not use: / \ ~ * < >)

* Email

* Phone

Fax

* Address Line 1

Address Line 2

* Country

* Preferred Language

* State/Province

* City

* Postal Code

<< Back to Step 2 Save and continue later Continue to Step 4 >>

10. Click **Continue to Step 4**.

11. Step 4 identifies contacts for various functions. In small organizations, this may be all the same person. In larger organizations, you can assign different roles to different individuals. To begin, Click **Add New** to add contact information for anyone else you'd like to assign here.

STEP 1 STEP 2 STEP 3 STEP 4

Tell us who to contact

For each function, select a contact or [Add New](#)

12. Select the contact to assign to each role. Here are some suggested roles for each communication type:

- **Flex Billing**
accounts receivable manager
- **Services & Support**
facilities manager
- **System Admin**
station network manager
- **New Station Requests**
station network manager
- **Administrative Notices**
station network manager
- **Cloud Plan Renewals**
accounts payable manager
- **New System Features**
station network manager
- **Driver Feedback**
station network manager
- **Maintenance Feedback**
facilities manager

13. Click **Continue to Step 5**.

14. Enter the Legal Entity Name for your organization.

15. Select the **I agree to the Terms and Conditions** checkbox.

STEP 1 STEP 2 STEP 3 **STEP 4** STEP 5 STEP 6

Tell us who to contact

For each function, select a contact or Add New

- * Flex Billing <select>
- * Services & Support <select>
- * System Admin <select>
- * New Station Requests <select>
- * Administrative Notices <select>
- * Cloud Plan Renewals <select>
- * New System Features <select>
- * Driver Feedback <select>
- * Maintenance Feedback <select>

<< Back to Step 3 Save and continue later Continue to Step 5 >>

STEP 1 STEP 2 STEP 3 STEP 4 **STEP 5** STEP 6

Agree to Terms and Conditions Print

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MASTER SERVICES AND SUBSCRIPTION AGREEMENT
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IF YOU ARE ENTERING INTO THIS AGREEMENT ON BEHALF OF A

* Organization Legal Entity Name

☐ * I agree to the Terms and Conditions

<< Back to Step 4 Save and continue later Continue to Step 6 >>

16. Click **Continue to Step 6**.

17. The final screen is where you let ChargePoint know where to send the money collected from your stations (Flex Billing) when drivers are charged for charging or for idle fees. This is optional and only important if you plan to charge drivers for using the station. Scroll down to complete the contact information, banking details, and agree to receive money from ChargePoint.

NOTE: If you don't have this information or don't plan to charge fees, you can select the **Set up Flex Billing Later** radio button.

18. Click **Create** to finish your account creation.

19. Once your account is created, contact the Activations team at activations@chargepoint.com or by calling [Owner Support](#) to notify them that the account is now ready for activation.

Once notified, the Activations team will complete your activation in the next 5-7 business days.

The screenshot shows the 'Activate Flex Billing' form, which is Step 6 of a 6-step process. At the top, there are six tabs labeled STEP 1 through STEP 6, with STEP 6 being the active tab. The form title is 'Activate Flex Billing'. Below the title, there are instructions: 'Instructions: You can activate the Flex Billing service by completing this form now, or you can do so later after logging into your account. Please allow 2-3 business days for your changes to be processed by ChargePoint. All fields are required (except where noted)'. There are two radio buttons: 'Set up Flex Billing Now' (which is selected) and 'Set up Flex Billing Later'. Below the radio buttons, there are three text input fields: 'ChargePoint Org Name' (with the value 'Activation Training'), 'ChargePoint Org ID', and 'Group Name' (with the value 'Organization Default'). Below these fields is a section titled 'Subscriber's Information'. This section contains three text input fields: 'Subscriber's Organization's Legal Name', 'Subscriber's Legal Address Line 1', and 'Subscriber's Legal Address Line 2'. At the bottom of the form, there are two buttons: '<< Back to Step 5' and 'Create'.