Account Setup

Getting Started Guide

Gather Essential Information

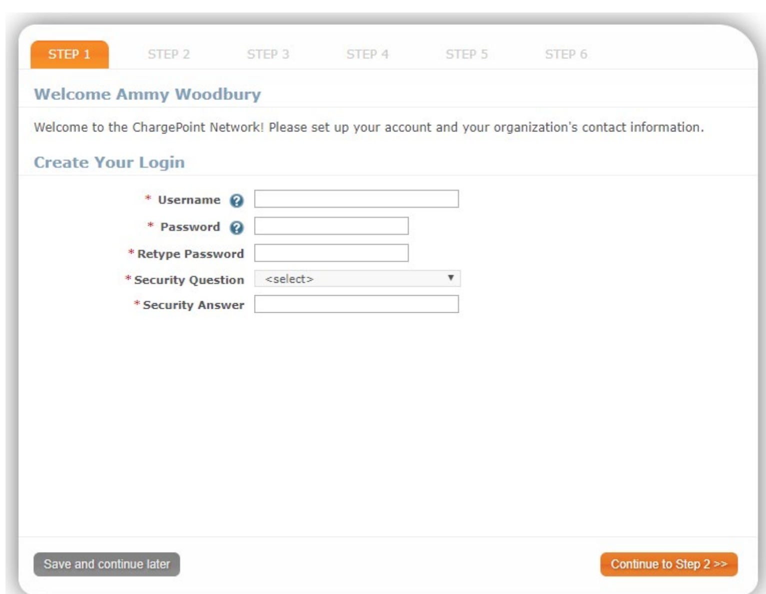
Congratulations on your new charging station! To get started, we need to know a little more about your organization. To create your account, you will need this information:

- 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

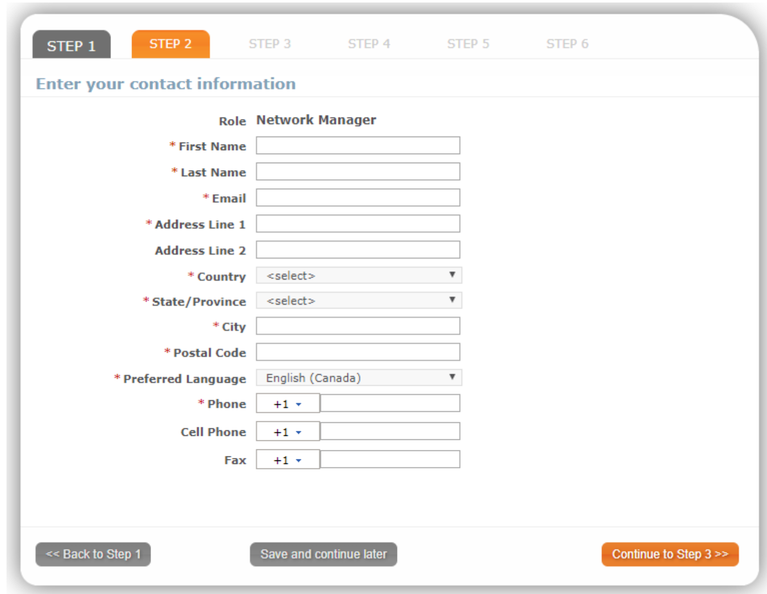
Create Your Account

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

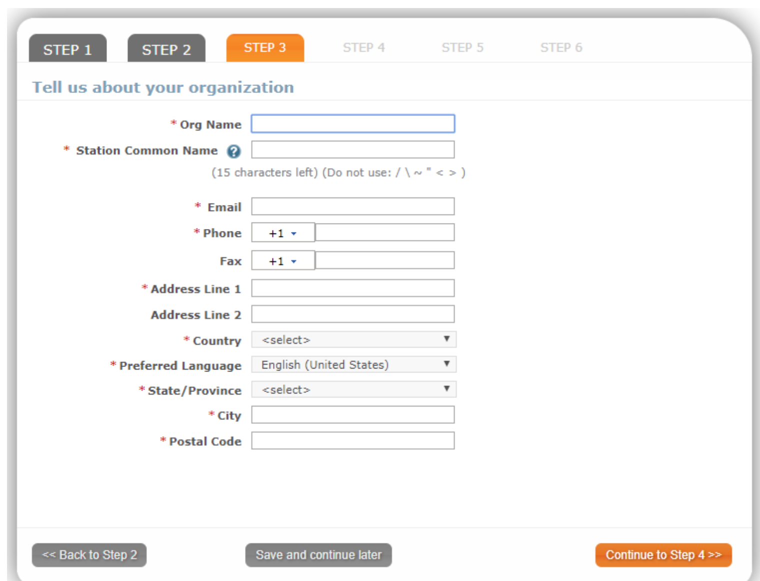
1. Select a username. We recommend using your email address.
2. Select a password. Your password must include:
    - 6-32 characters
    - At least 2 numbers
    - At least 1 letter
    - No spaces
3. Retype the password to verify it is typed correctly
4. Select a Security Question from the list.
5.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



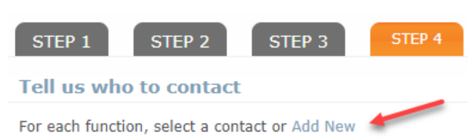
7. Enter your contact information.



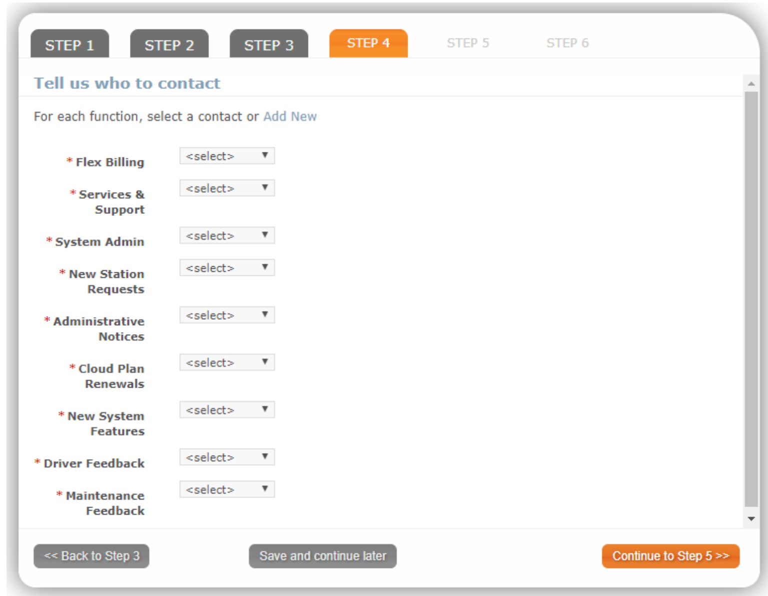
8. Click **Continue to Step 3**.
9. Enter your organization information. Most of the information is things you know, but there are two key fields:
    - **Station Common Name:** Every station in ChargePoint has a name, consisting of two components. One component is the Common Name. It is the same for 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.)



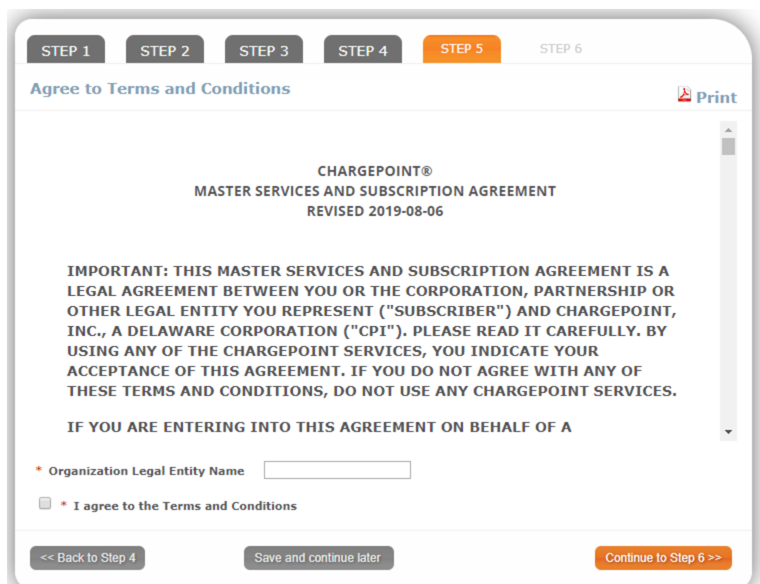
10. Click **Continue to Step 4**.
11. Step 4 identifies contacts for various functions. In small organizations, this may be all the same person. In larger organizations, you can assign different roles to different individuals. To begin, Click **Add** New to add contact information for anyone else you'd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



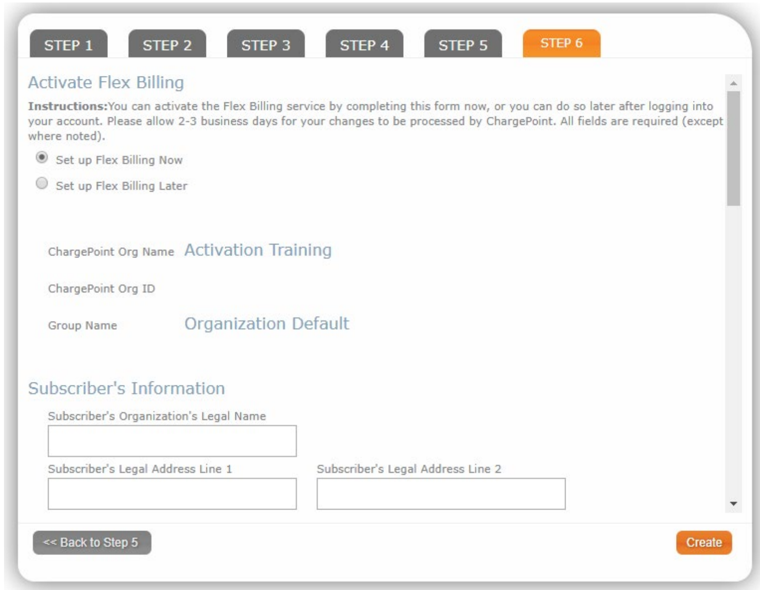
12. Select the contact to assign to each role. Here are some suggested roles for each communication type:
    - **Flex Billing**
      accounts receivable manager
    - **Services & Support**
      facilities manager
    - **System Admin**
      station network manager
    - **New Station Requests**
      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.



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.