

ChargePoint Connections

In this document:

Connections allows station owners to specify who (which Drivers) are eligible to receive special benefits on their stations, such as access to restricted stations, or discounted pricing (even free) on stations that charge a fee. Drivers you approve through a Connection are automatically added to a Driver Group that has the same name as the Connection. You can then specify special access privileges and/or pricing for that Driver Group when creating Access Policies and Pricing Policies, respectively.

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What's New in Connections?

- Approve a driver connection directly from your dashboard
- Create multiple connections to serve your audiences
- Create a Connection and a linked Driver Group of the same name will be created (eg, “Employees” or “Residents”) – drivers approved through a connection are automatically added to the linked Driver Group
- Create Driver Groups that are not linked to a connection (existing behavior). See Creating Custom Driver Groups for more information
- Add a Connection to an existing Driver Group

NOTE: If you already have Driver Groups established and want to use the multiple connections feature to better serve these groups, please contact Support for assistance in migrating groups and attaching connections to them.

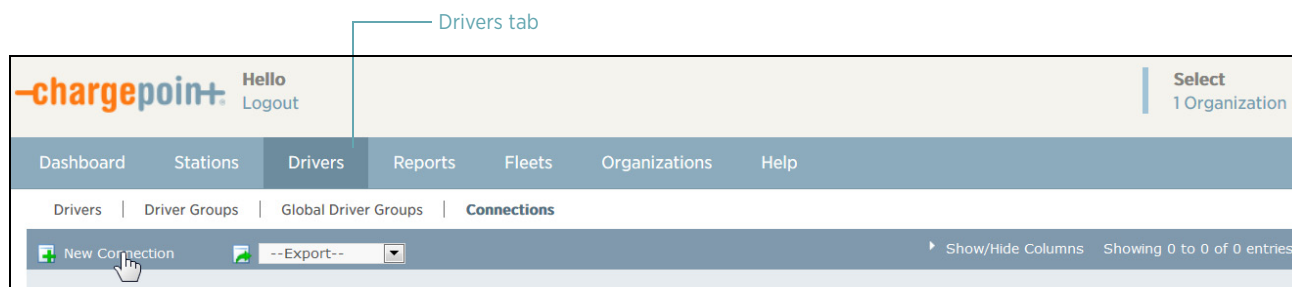
Connecting to Drivers is a two-step process:

- 1 Publish one or more Connection offers
- 2 Approve or deny connection requests from drivers on an ongoing basis. (You may also enable Auto-approval.)

NOTE: Only a Network Manager, Property Manager, or Connections Officer can publish connection offers and approve connection requests.

Publish a Connection Offer

- 1 Log in to ChargePoint; click the **Drivers tab**, click **Connections**, then click **New Connection**.



- 2 In the **Connection Name** field, enter the connection name, such as Employees or Customers.

 A screenshot of the 'New Connection' form. The form has a title 'New Connection' and a close button (X) in the top right corner. It contains several fields:

- * Connection Name**: A text input field with 'Employees' entered and a clear (X) button.
- Status**: A checkbox labeled 'Enable' which is checked.
- * Connection Logo**: A button labeled 'Upload file' with a note '60 Width x 30 Height Required (PNG,JPG,GIF)'.
- * Org Name**: A text input field with 'HiTech Co (ORG987654)' entered.
- * Org Nickname to Drivers**: A text input field with 'HiTech Co' entered.
- * Org category**: A dropdown menu with 'Employer' selected.
- Driver Info Required 1**: A text input field with 'Last 3 digits of employee n' entered.
- + Request Additional Info**: A button with a plus icon.
- * Available to**: A text input field with 'HiTech Co Employees' entered.
- * Benefits**: A text input field with 'Free Charging' entered.
- * Visible to**: Radio buttons for 'All Drivers' (unselected) and 'Only drivers entering connection code:' (selected). The latter has a text input field with '445544' entered.
- * Auto-approve**: A dropdown menu with 'Disabled' selected.
- * Custom Terms and Conditions**: A dropdown menu with '-- Select Option --' selected.

 At the bottom of the form are three buttons: 'Cancel', 'Preview', and 'Save'.

NOTE: Click the question mark symbol next to any item for more information.

- 3 Click the **Enable** checkbox to make the connection offer active. You can disable the offer at any time by un-checking this box.
- 4 To add your **Connection Logo**, click **Upload file**.
NOTE: For best results, use a 60w x 30h PNG file with a transparent background.
- 5 In the **Org Name** field, enter your organization's name unless it has already been entered for you.
- 6 In the **Org Nickname** field, enter your organization's name the way you want drivers to see it.
- 7 From the **Org category** drop-down list, select the category that best matches your type of organization.
- 8 *Optional:* In the **Driver Info Required** field, enter information a driver must provide when requesting a connection (eg, Employee ID, Loyalty card number, account, etc). This information allows you to verify the driver. You can ask the Driver for various types of information.
- 9 In the **Available To** field, describe who can connect with your organization. For example, "All Drivers", "Employees Only", or "Loyalty Card Holders".

- 10 In the **Benefits** field, enter the benefit you are offering to connected drivers (eg, free charging, access, discounted rate, etc).
- 11 In the **Visible to** field, select **All Drivers** to make your Connection offer visible to all ChargePoint Drivers. Or, enter a Connection Code to make your offer visible only to Drivers that have received the code through email or other means.
NOTE: Even if a driver has the Connection Code, you must still approve the connection request before the driver can connect to your organization. Read more in *Approve Connection Requests* on page 4.
- 12 In the **Auto-approve** field, if you **Enable** it, incoming Connection Requests from all Drivers will be approved immediately and automatically by the ChargePoint system. **Disable** Auto-approve if you prefer to have someone in your organization approve or deny incoming Connection Requests from Drivers (the default).
- 13 In the **Custom Terms and Conditions** field, you have the option of adding a statement to which drivers must agree to complete their connection and receive the offer benefits. You can also choose to have a 'signed' copy of the Terms and Conditions sent to a specified email so that you have a record of the agreement under that driver's name.

NOTE: Use only plain text (ASCII) in the Terms and Conditions box. Do not include HTML or any other markup language.

- 14 Click **Preview** to review what drivers will see.

- 15 Close the preview window by clicking the X in the upper right corner and, if you are satisfied with the connection offer text, click **Save**.

When you click Save, your connection is active and drivers can request to connect with your organization.

Approve Connection Requests

Unless Auto-approve is enabled, all connection requests must be manually approved or denied.

NOTE: Only a Network Manager, Property Manager, or Connections Officer can approve or deny connection requests.

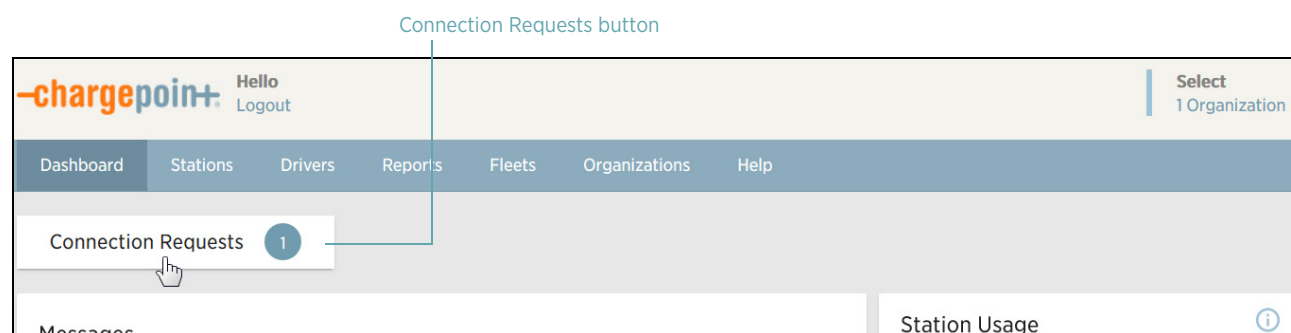
You can approve connection requests:

- From the Dashboard
- From the Drivers table

From Your Dashboard

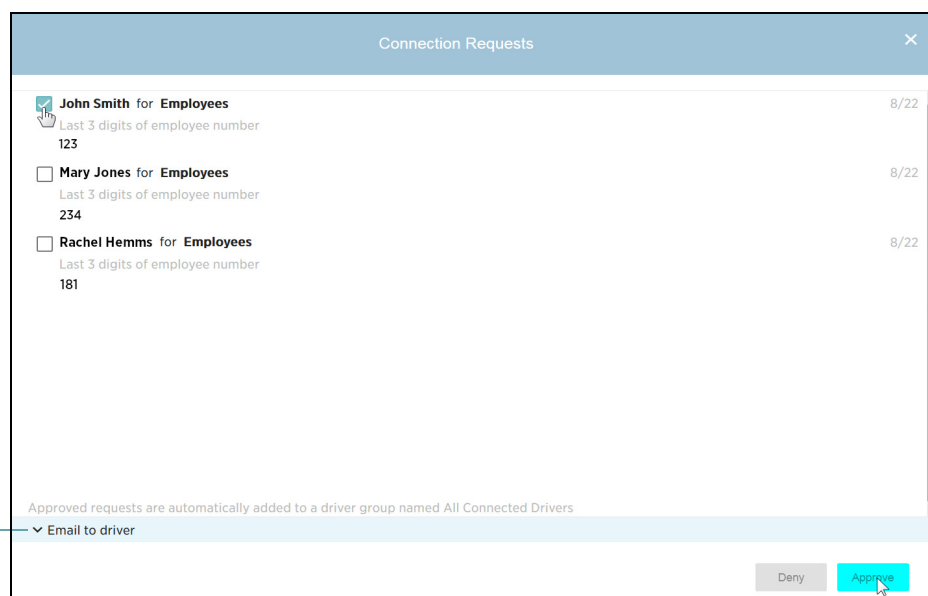
- 1 To approve or deny connection requests from the Dashboard, click the **Connection Requests** button.

NOTE: The number in the circle on the right side of the button shows the number of pending connection requests.



This will display a list of drivers and the specific Connection through which they requested their connection. Click the checkbox located in front of any or all driver's names, then click the **Approve** or **Deny** button at the bottom of the screen.

Click down arrow to send a personalized email to the driver



If you have created Driver Groups (not linked to a Connection), you can optionally add Drivers to those groups in this step. Drivers will always be added to the Driver Group that is linked to the Connection ("Employees" in the example above).

You can also include a message to the driver that is included in the Connection Approval (or Denial) email confirmation. You can use this, for example, to specify your organization's EV charging etiquette or specify to the driver why the connection request was denied.

From the Drivers Table

- 1 If you are already in the **Drivers** tab, you can approve or deny connection requests from the **Drivers** table. Display the table by clicking **Drivers**, as shown below.

Drivers

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Hello

Logout

Select

1 Organization

Dashboard

Stations

Drivers

Reports

Fleets

Organizations

Help

Drivers

Driver Groups

Global Driver Groups

Connections

New Connection

--Export--

Show/Hide Columns

Showing 1 to 1 of 1 entries

	Org Name	Org Nickname to Drivers	OrgID	Connection Name	Connection Status	Info Required	No. of Connected Drivers	Available To	Benefits	Visibility	Auto-Approve
	HiTech Co	HiTech Co	ORG987654	Employees	Enabled	Last 3 digits of employee number	0	HiTech Co Employees	Free Charging	Private	Manual

In the Drivers table you will see all of your organization's connected drivers and connection requests.

TIP: To sort the list by status, click the **Driver Connection Status** column heading.

- 2 Click the checkbox associated with one or more PENDING drivers.

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Hello David

Logout

Select

1 Organization

Dashboard

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Reports

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Global Driver Groups

Connections

Update Connection

Select

--Export--

Show/Hide Columns

Showing 1 to 1 of 1 entries

	Avatar Name	Driver First Name	Driver Last Name	Driver Connected with Org Name	Driver Connection Info	Driver Connection Status	Driver Connection Date (PDT)	Driver Connection Name	User ID	Driver Group Name	Currency Name
	HiTechEmployee	John	Smith	HiTech Co	Last 3 digits of employee number: 123	PENDING		Employees	2298131		U.S. Dollars (USD)

Checkbox column

Driver Connection Status

- 3 To approve or deny the selected driver(s), select **Approve** or **Deny** from the **Update Connection** drop-down list. (You can also choose to **Remove** an already connected driver.)

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Hello

Logout

Select

1 Organization

Dashboard

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Drivers

Driver Groups

Global Driver Groups

Connections

Update Connection

Approve

Select

Approve

Deny

Remove

--Export--

Show/Hide Columns

Showing 1 to 1 of 1 entries

	Avatar Name	Driver First Name	Driver Last Name	Driver Connected with Org Name	Driver Connection Info	Driver Connection Status	Driver Connection Date (PDT)	Driver Connection Name	User ID	Driver Group Name	Currency Name
☒	HiTechEmployee	John	Smith	HiTech Co	Last 3 digits of employee number: 123	PENDING		Employees	2298131		U.S. Dollars (USD)

Select Approve or Deny

- 4 *Optional:* Assign the driver(s) to a custom driver group (see “*Creating custom driver groups*” for instructions), then click **Approve connection**. If you haven't created any custom driver groups, the approved drivers are automatically added to the default All Connected Drivers group, as shown here.

Approve connection

☒	Driver First Name	Driver Last Name	Driver Connection Name	Driver Connected with Org Name	Driver Connection Status
☒	John	Smith	Employees	HiTech Co	PENDING

Add to Driver Group(s)

☐	Driver Group Name	Org Name	Number of Drivers
☒	All Connected Drivers	HiTech Co	

Showing 1 to 1 of 1 entries

Optional Message to Driver ?

Cancel

Approve connection

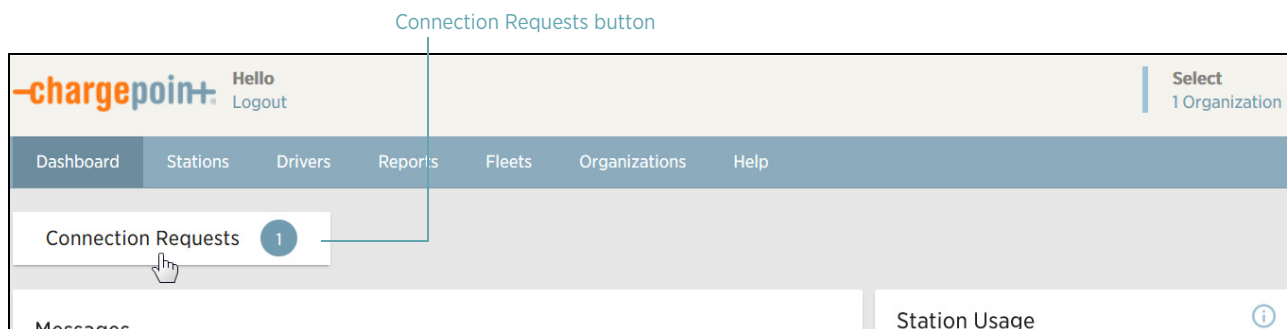
The selected drivers are now connected with your organization and included in your list of All Connected Drivers.

Approve Request and Assign Station (Multi-Family Home Service)

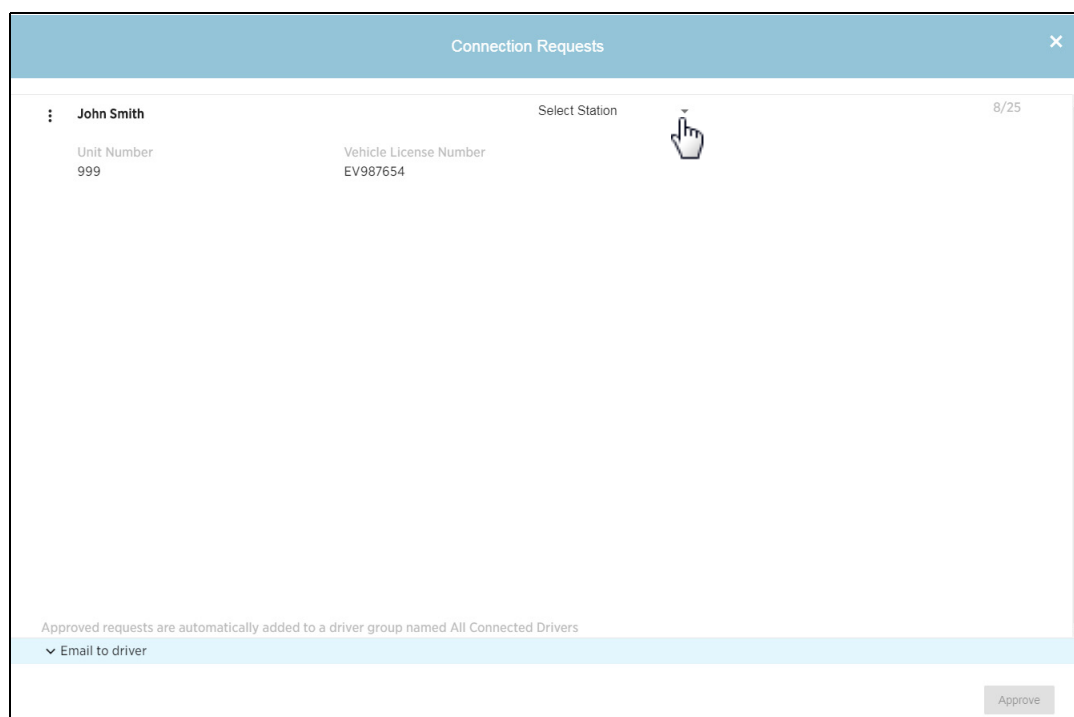
If you are a property manager who needs to approve Connection requests *and* assign residents to a dedicated parking space with charging station in your community, please follow the instructions below.

- 1 To approve or deny connection requests from the Dashboard, click the **Connection Requests** button.

NOTE: The number in the circle on the right side of the button shows the number of pending connection requests.



- 2 From the Connection Requests pop-up window, click the **Select Station** drop-down menu.



- 3 Select the station/space you wish to assign and then click the **Approve** button at the bottom of the screen. You can also include a message to the driver that is included in the Connection Approval (or Denial) email confirmation.

Click down arrow to
send a personalized
email to the resident
driver

The screenshot shows a 'Connection Requests' window. At the top, it says 'Connection Requests' with a close button. Below that, the user 'John Smith' is listed with a unit number '999' and a vehicle license number 'EV987654'. A dropdown menu titled 'Select Station' is open, showing options: 'Bldg 1, Spot 01', 'Bldg 1, Spot 02', 'Bldg 1, Spot 03', 'Bldg 2, Spot 01', 'Bldg 2, Spot 02', and 'Bldg 2, Spot 03'. At the bottom right, there is an 'Approve' button. A hand cursor is pointing at the 'Approve' button. A light blue bar at the bottom contains the text 'Approved requests are automatically added to a driver group named All Connected Drivers' and a dropdown arrow next to 'Email to driver'.

The selected resident is now connected with your property and has been assigned a parking space/charging station.