ChargePoint Fleet



User Guide

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Understanding ChargePoint Fleet

This user guide is for business-owners who own and run a fleet of Electric Vehicles (EVs) and may also own one or more ChargePoint CPF25 commercial charging stations. This guide provides information setting up your fleet of vehicles and configuring CPF25 depot stations to serve the needs of your fleet vehicles.

Fleet

ChargePoint provides tools for Fleet Managers to activate ChargePoint cards to vehicles, and to group vehicles into fleets. Coupled with ChargePoint smart charging stations, the fleet functionality allows you to:

- Track energy use by vehicle and by fleet
- Enter a fuel card or other payment method to allow your vehicles to charge at stations requiring payment

A fleet is a group of vehicles sharing the same information that is configured for the fleet, such as pricing, telematics integration, etc. Each individual vehicle in the fleet is associated with a vehicle identifier (the license plate) and a unique ChargePoint RFID Card serial number. Using the fleet features allow you to

- Save capital expense through panel sharing
- Save operational expense through scheduled charging and other energy management features
- Restrict use to just fleet vehicles, preventing other vehicles from charging (for example, the general public)
- Perform capacity planning and other analytics
- Use a fuel card to allow your vehicles to charge at stations that require payment

Charging Stations

ChargePoint offers a variety of smart, networked charging stations to serve the needs of every fleet. The ChargePoint CPF25 Level 2 charging station is specifically designed for fleet **depot** applications, where the stations are used exclusively by fleet vehicles.

For mixed-use applications, where fleet vehicles share charging stations with drivers of personal vehicles, ChargePoint offers the CT4000 family of charging stations.

For bus and truck applications, and for passenger and light-duty vehicles requiring fast turnaround, ChargePoint offers an industry-leading suite of DC Fast chargers.

To learn the right product mix based on your fleet charging needs, contact your ChargePoint sales representative.

Station Activation

Before you can use the charging stations, they must be installed and activated. During installation, the installer prepares a Post-Installation Checklist for each station and gives those checklists to you. Attached to the bottom of each checklist is the activation label that you will need to activate the station on ChargePoint.

You can activate the stations yourself or purchase Activation and Configuration Service from ChargePoint. When you purchase this service, a Support Specialist works with you to activate and configure your stations.

To do it yourself, an instructional video called “How to activate your station and Service Plan” and a printable step-by-step instruction are available. Simply log in to ChargePoint (**Help** > **Video and Manuals**).

What Next

You need a current cloud subscription to ChargePoint and log in as a Network Manager or Fleet Manager. Contact your ChargePoint Sales Representative for more information.

1. Set up your fleet of vehicles in ChargePoint, go to page 5
2. Control who can access your stations, go to page 13
3. Monitor your fleet status and activities, go to page 17
4. Generate and share reports, go to page 21
5. Make changes to your fleet, go to page 29
6. Set up scheduled charging to save on energy costs, go to page 35
7. Enable telematics integration to access advanced features such as automatic odometer capture and fraud prevention, go to page 41
8. Configure power management, go to page 45

Setting up your Fleet of Vehicles

This section walks you through all basic steps of setting up your fleet using ChargePoint. The basic setup includes the following tasks:

+ Creating a Fleet on page 6
+ Setting up a Payment Method for your Fleet on page 7
+ Adding your Vehicles to ChargePoint on page 9
+ Testing and Verifying the Charging Operation on page 11

Creating a Fleet

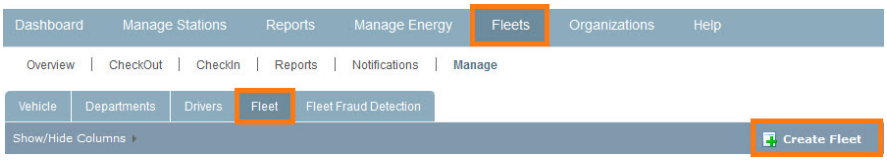
You can have multiple fleets.

If the vehicles were already created in ChargePoint, you can add them to the Fleet during this process; otherwise, you can create and add them later, see Adding your Vehicles to ChargePoint on page 9.

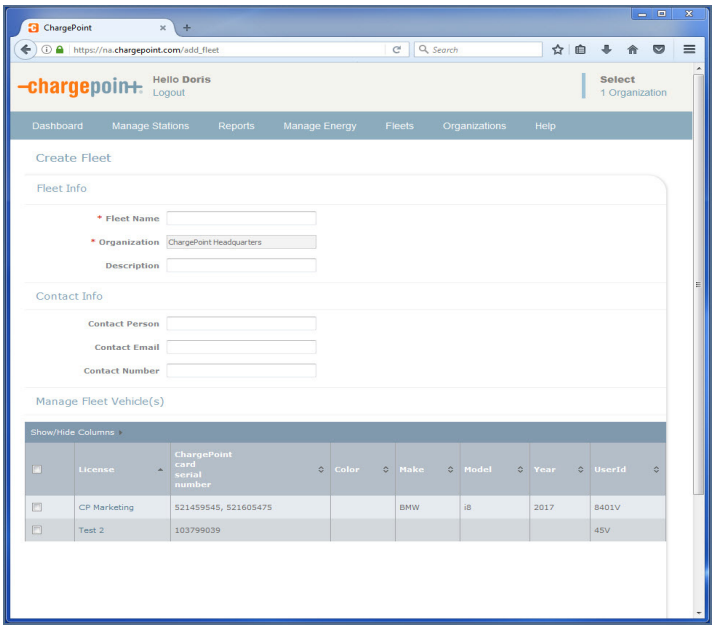
Hint

Creating a fleet first is a more efficient workflow as you can enter everything about the vehicle at the same time: License, RFID card, Make/Model, Voyager card (if applicable), VIN and Telematics (if applicable), etc.

1. Click the **Fleet** tab.



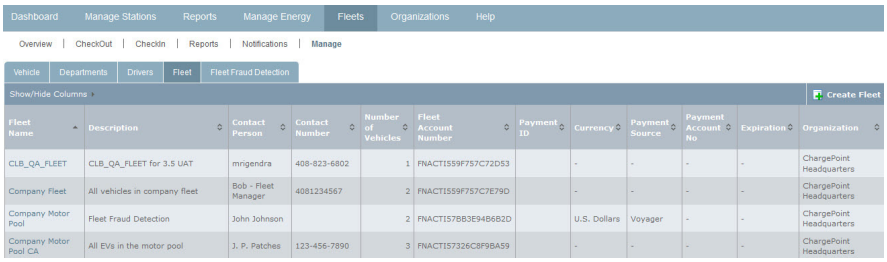
2. Click **Create Fleet**.



3. Enter a name and a description for the fleet.
4. Optionally, enter information on the person to contact regarding this fleet.

5. Select the vehicles you want to associate with the fleet, click **Add Fleet**.

   Your new fleet is added and appears in the list on the **Fleet** tab.

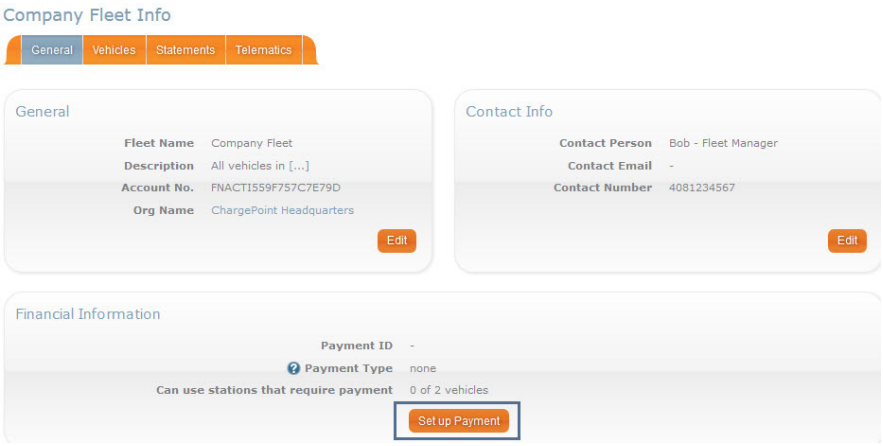


Setting up a Payment Method for your Fleet

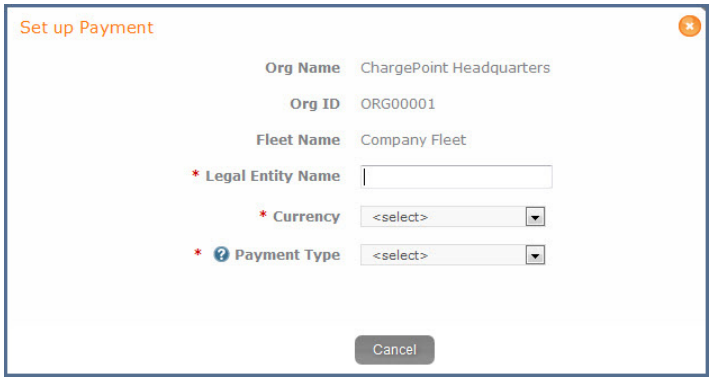
By default, fleet vehicles can charge only at stations that have been configured by the station owner to be free for your fleet vehicles to use. Typically, this includes the stations you own, but may not include stations on route.

To ensure that your fleet vehicles can charge at stations that require payment, set up a payment method that can be used fleet-wide.

1. On the **Fleet** tab, click the name of the fleet for which you want to set up the payment.



2. Click **Set up Payment**.



3. Enter the legal name of the company.
4. Select your preferred currency. Options include:
   + Canadian Dollars
   + Euros
   + Mexican Pesos
   + U.S. Dollars
5. Select the payment type. Options include:
   + **ChargePoint Fuel Card Service**—When you select this source for payment, a **Set up Payment** form opens. Enter the information requested on-screen, such as your estimated annual charging fees and the contact information for Accounts Payable.

     ChargePoint sends you a quote requesting a PO against which you will be invoiced each month for the fees incurred by your fleet vehicles as they charged at stations that required payment.
   + **Credit Card/PayPal**—A standard credit card or PayPal™ account. When you select this source for payment, select **I agree with the Terms & Conditions** check box, then click **Continue**, and follow the on-screen instructions to enter your payment information.

     Once the payment method is set up, it is available for use immediately by your fleet vehicles.
   + **Voyager Fleet Card**—Click **Save** when you select this source for payment.



Note
When Voyager card is the selected payment method, you need to specify the Voyager account number and expiration date for each vehicle.

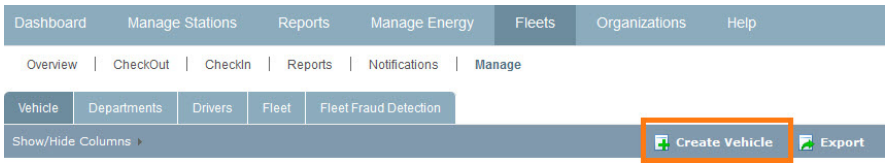
Adding your Vehicles to ChargePoint

In ChargePoint, each vehicle is assigned one unique ChargePoint RFID card (although multiple ChargePoint RFID cards per vehicle is allowed). ChargePoint recommends physically attaching the card to the vehicle's key chain or placing the card inside the vehicle's glove box.

1. Log in to ChargePoint.
2. Click **Fleets** > **Manage**.



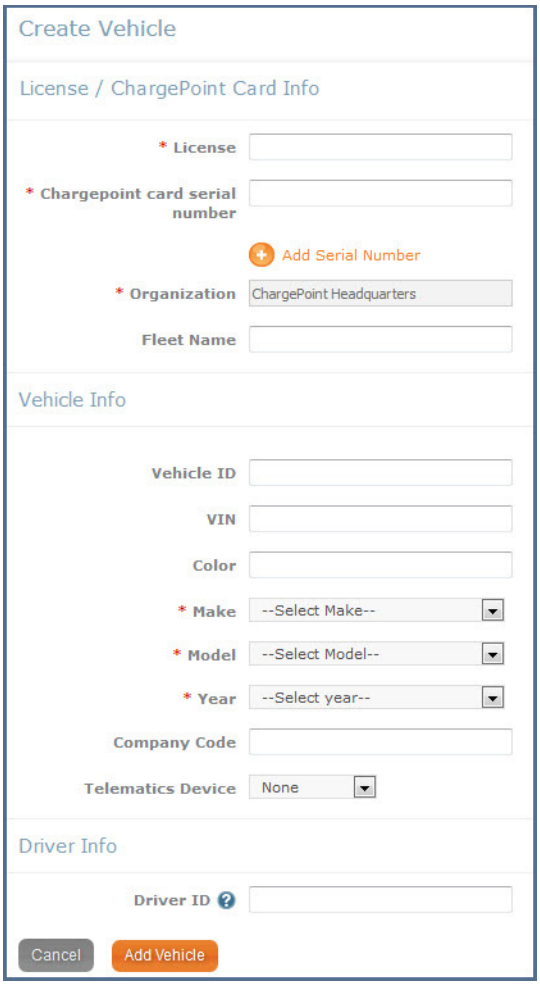
3. Click **Create Vehicle.**



4. Enter the following information in the **Create Vehicle** form. (This information helps you track the charging activity for each of your fleet vehicles.)
   + License—vehicle's license plate number
   + ChargePoint card serial number—written on the card (as shown)



Note
An asterisk (*) next to a field indicates information you must provide.



5. Select the vehicle's make, model and year from its respective drop-down list.
6. Optionally, enter an identifier in the **Company Code** field.

   The Fleet Manager can use this identifier to track the department or company to which the vehicle is assigned or managed.

Note
If you plan to enable telematics integration for your fleet and have the information available, you can save yourself time by entering each vehicle's VIN and Telematics Device information, and enabling Fraud Detection as part of this step.

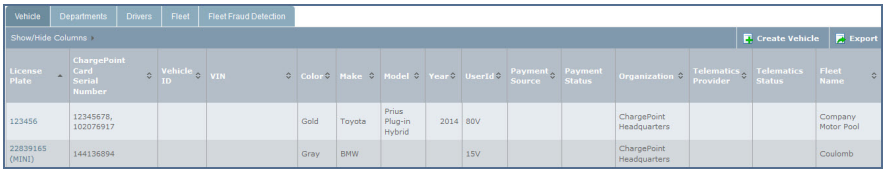
7. If you are assigning this vehicle to one specific employee, enter that employee's identification information (such as an employee number or driver's license number) in the **Driver ID** field.

8. Click **Add Vehicle** and provide the Voyager account number and expiration date of the Voyager card assigned to this vehicle.

Note
Add Fleet Card will only be available if Voyager has been specified as the Payment Method for the Fleet.

9. Click **Save**.

   The new vehicle appears in the list on the **Vehicle** tab.



Testing and Verifying the Charging Operation

Verify that each fleet vehicle will charge with the ChargePoint card assigned to it. You can test your vehicle on any station that allows your fleet to charge (this is a function of access control). Keep in mind if you didn't set up a payment method, you'll need to use a free station.

When the CPF25 charging station is powered on and activated, the ring surrounding each holster illuminates to indicate status as described in the following table.

CPE25 LED	Meaning
	No LED indicates that the charging station is idle (including vehicle plugged in but not authorized)
	Pulsing yellow indicates that authorization is in progress
	Pulsing green indicates that the card is approved and schedule is set to delay charging
	Solid green indicates that the card is approved and station is ready to charge
	Pulsing blue indicates that the vehicle is charging
	Solid blue indicates that the vehicle is plugged in but not yet charging (or vehicle is fully charged)
	Solid red indicates that the card is temporary denied or a fault has occurred (permanent)



To charge a vehicle:

1. Turn off the vehicle.
2. Tap the vehicle's ChargePoint card on the station's card reader.

   The station beeps once when it reads the card completely.
3. Plug the connector into the vehicle.

   Charging begins when the vehicle acknowledges the station.

   To stop a charging session before the end of the charging cycle, remove the connector from the vehicle and return it to the station's holster.

Controlling Access to your Stations

CPF25 is designed for depot applications where they are used exclusively by fleet vehicles. If your depot stations are physically accessible to the public, consider creating an access policy so that only your fleet vehicles can plug into them.

By contrast, the ChargePoint CT4000 family of charging stations is designed to accommodate mixed-use deployments, where fleet vehicles and personal vehicles (for example, those belonging to employees) can access the same charging stations, and provides an option to restrict different types of vehicles to different access times.



Note
Setting up a CT4000 in a mixed-use environment is outside the scope of this document. Log in to ChargePoint (**Help** > **Video and Manuals**) to learn more about Connections, Driver Groups, and Access Control, or contact Support for assistance.

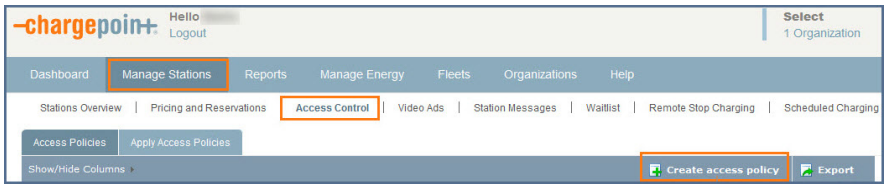
This section provides information and instructions for controlling access to your CPF25 stations, which includes the following topics:

+ Creating an Access Policy on page 14
+ Applying the Access Policy on page 15

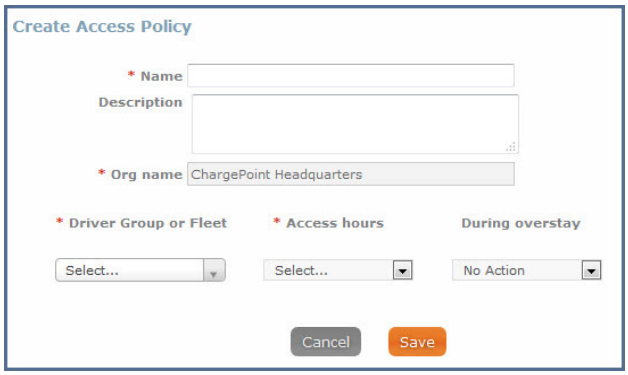
Creating an Access Policy

You create your access policy defining who can access your stations.

1. Log in to ChargePoint.
2. Click **Manage Stations** > **Access Control**.



3. Click **Create Access Policy**.

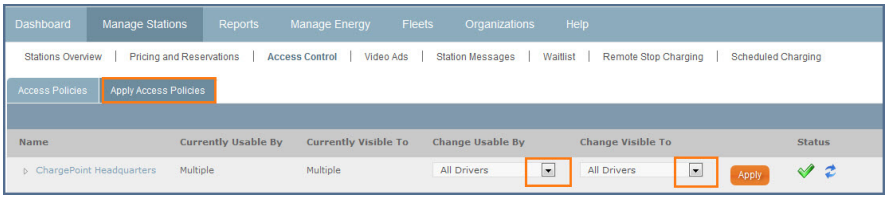


4. Enter a name and an optional description for the policy in their respective fields.
5. Select the fleet to be included in this policy from the **Driver Group or Fleet** drop-down list.
6. Select **Anytime** from the **Access hours** drop-down list, and **Never** for **Everyone Else**.
7. Optionally, click **Add** to add another fleet.
8. Click **Save**.

   The policy is created and appears in your list of access policies. You can now apply an access policy to your vehicles.

Applying the Access Policy

1. Click the **Apply Access Policies** tab.



2. Select the name of the Access Policy you created in the previous section from the **Change Usable By** drop-down list.
3. Select the name of the Access Policy you created in the previous section from the **Change Visible To** drop-down list.
4. Click **Apply**.

   A green check mark appears beside the station, indicating that the access policy has been successfully applied.

Monitoring your Fleet

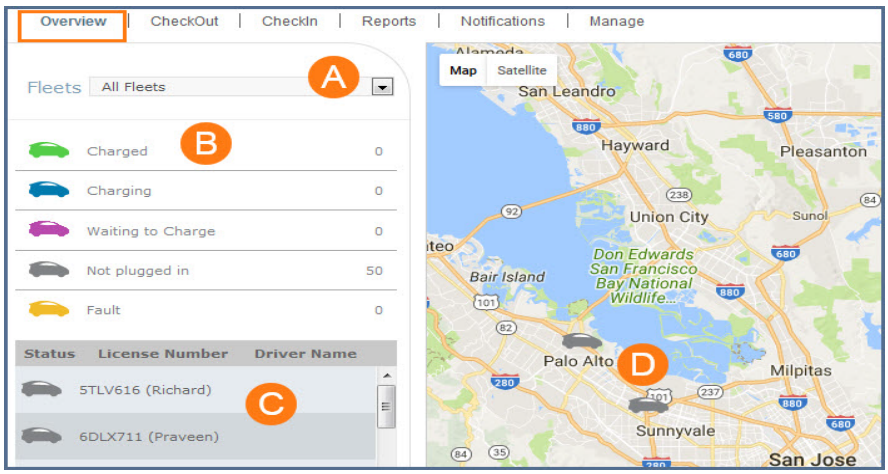
Once a vehicle has been added to a fleet, it is listed on the Fleet **Overview** page, which provides at-a-glance information about each vehicle in your fleet, including its charging status.

This section includes the following topics:

+ Viewing your Fleet Status on page 18
+ Taking Actions on a Specific Station on page 19

Viewing your Fleet Status

1. Log in to ChargePoint.
2. Click **Fleets** > **Overview**.

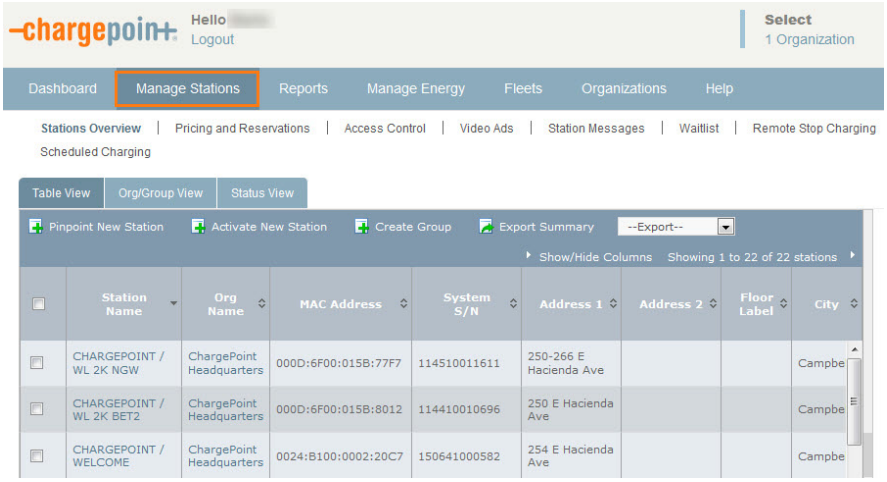


3. Select your fleet from the drop-down list (indicated by **A**).
4. View the vehicles in your fleet; color code indicates its charging status (indicated by **B**).
5. Click on a vehicle in the list (indicated by **C**) to view its information on the map.
6. View the vehicles that are currently plugged in to a charging station on a Google™ map (indicated by **D**).

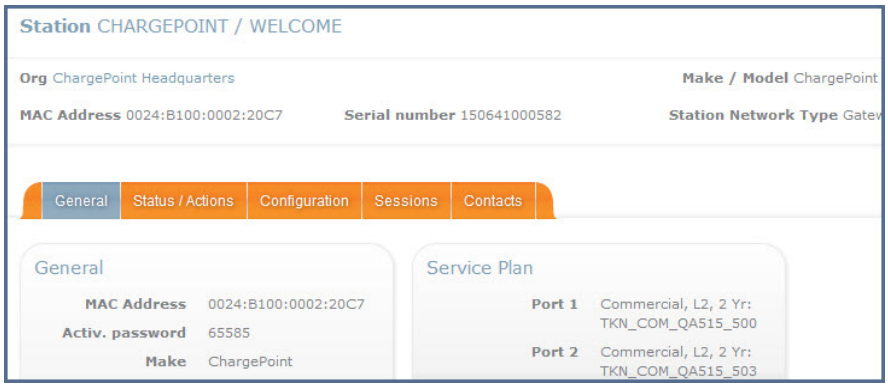
Note
A vehicle that is not plugged in and does not have Telematics does not appear on the map.

Taking Actions on a Specific Station

1. Log in to ChargePoint.
2. Click **Manage Stations.**



3. Click the intended station name to display its details.



4. Click **Status/Actions**.

Generating Reports

Whether you are station managers or fleet managers, you can generate reports and use the data for analytical purpose. You can also export the same data in graphical and text formats that can be shared with other interested parties.

ChargePoint provides reports that show the activity of the fleet vehicles and activity of your stations. The section includes the following topics:

+ Viewing Reports of your Fleet on page 21
+ Viewing Analytic Reports of your Fleet on page 22
+ Viewing Financial Transactions Report on page 23
+ Viewing Reports of your Stations on page 24
+ Sharing Reports with Others on page 27

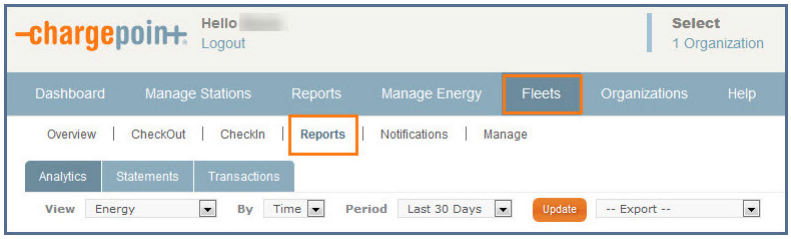
Viewing Reports of your Fleet

ChargePoint provides the following reports that show the activity of the fleet vehicles:

+ **Analytics** include graphs that show energy consumption of your fleet, greenhouse gas (GHG) savings, etc.
+ **Transactions** show financial transactions on every charging session, including the fee (if any), start and end dates, payment type, etc.
+ **Statements** show the statements for fleets that have enabled a payment source.

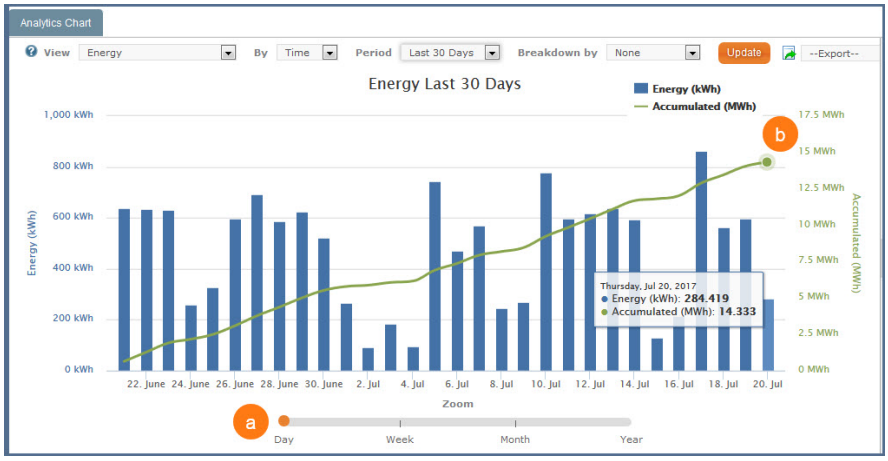
Viewing Analytic Reports of your Fleet

1. Log in to ChargePoint.
2. Click **Fleets** > **Reports**.



3. Select the graph you want to analyze from the **View** drop-down list. Options include:
   - **Energy** graph is the first report generated and displayed. The graph shows the amount of electricity in kilowatt hours (kWh) used by your fleet.
   - **Gasoline Savings** graph shows the amount of gasoline (in gallons) that has been saved by having your fleet use electricity as fuel.
   - **GHG Savings** graph shows the amount of greenhouse gas emissions your fleets have saved by using electricity as fuel.
   - **Table** lists detailed information about every charging session by all your vehicles, including telematics information (odometer information and the fraud detection results).
4. Select the duration to include the data from the **Period** drop-down list.
5. Click **Update**.

   The following screen shows a sample graph on energy usage.



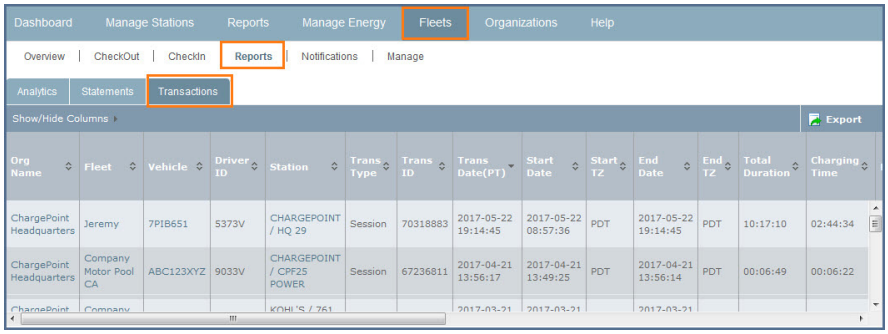
6. Use the buttons to customize the information that appears in the report.
   + Slide the zoom button (indicated by **a**) to view the data on a daily, weekly, monthly or yearly basis.
   + Mouse over the line or bars to see a popup window with additional data for that point (indicated by **b**).

Viewing Financial Transactions Report

To view the detailed information on all charging sessions of your fleet vehicles:

1. Log in to ChargePoint.
2. Click **Fleets** > **Reports**.
3. Click **Transactions**.

   The following screen shows a sample report on transactions.



Note

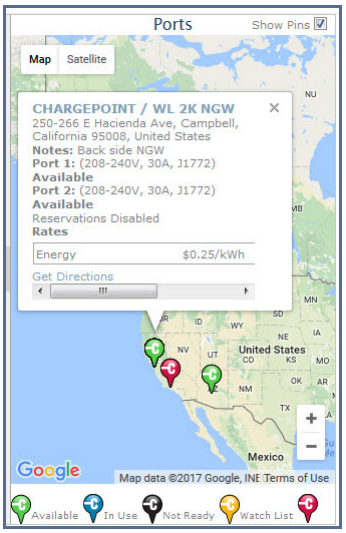
The Voyager / US Bank system processes only transactions that involve payment; they cannot process charging sessions where the total amount is $0.00 (ie, free). As a result, your Voyager / US Bank statement will only show **paid** transactions but **not** the **free** ones.

Viewing Reports of your Stations

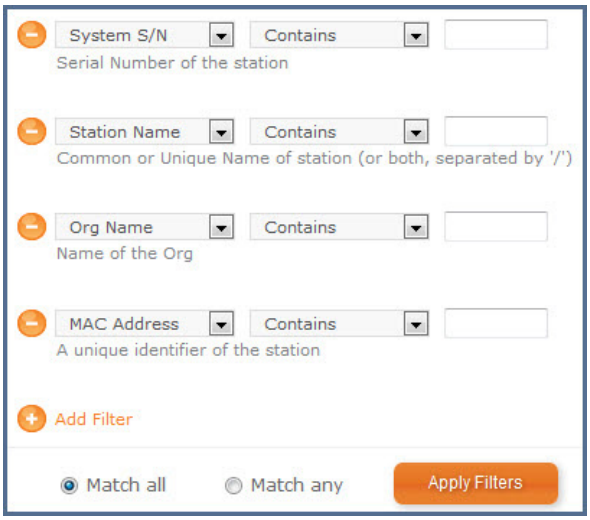
1. Log in to ChargePoint.
2. Click **Reports**.



3. View the number of stations in the area on the map.
   + Click the orange circle to zoom in to those stations. To see pins instead of the orange circles, select the **Show Pins** check box.
   + To see information on a specific station, click the symbol on the map, as shown in the following example.

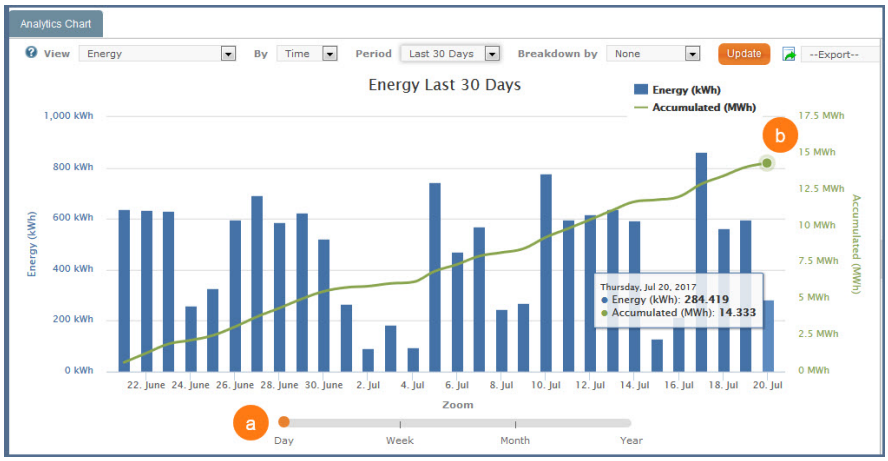


4. Click **Filter**, specify the information you want to display on the graph, for example, you can filter on Station Name to see the usage of one particular station, and then click **Apply Filters**.

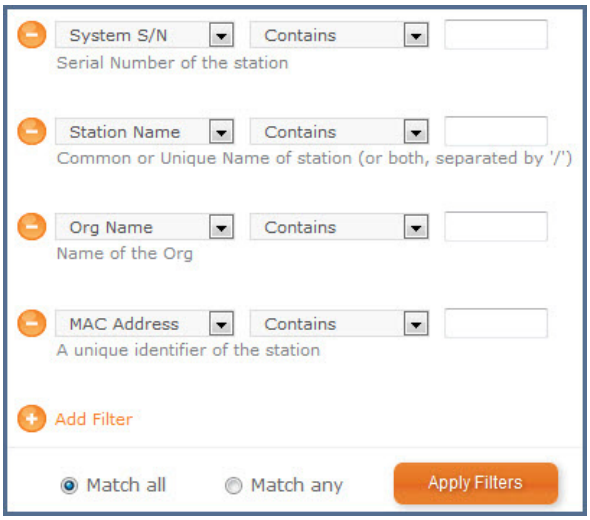


5. Select from the following drop-down lists to display specific data on the graph.
   a. Select the type of data to display from the **View** drop-down list.
   b. Select Time or Object from the **By** drop-down list.
   c. Select the duration to display the data from the **Period** drop-down list.
   d. Select None or Driver Group from the **Breakdown** drop-down list.
   e. Click **Update**.

   The following screen shows a sample graph on energy usage.



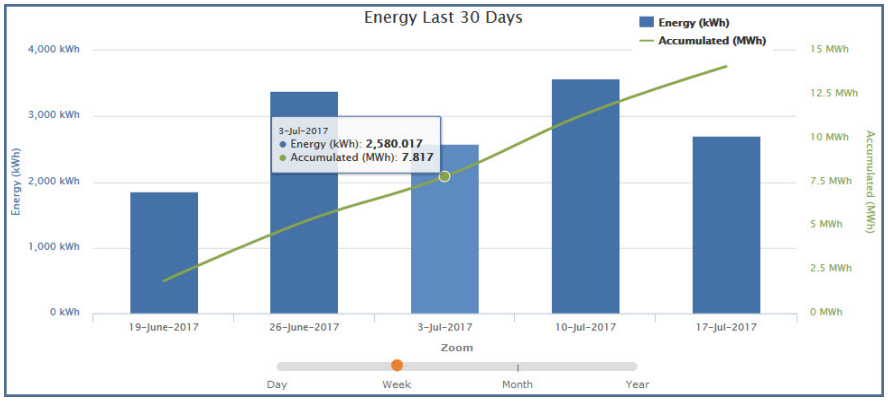
6. Click **Filter**, specify the information you want to display on the graph, for example, you can filter on Station Name to see the usage of one particular station, and then click **Apply Filters**.



7. Use the buttons to customize the information that appears in the report.

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   + Mouse over the line or bars to see a popup window with additional data for that point (indicated by **b**).

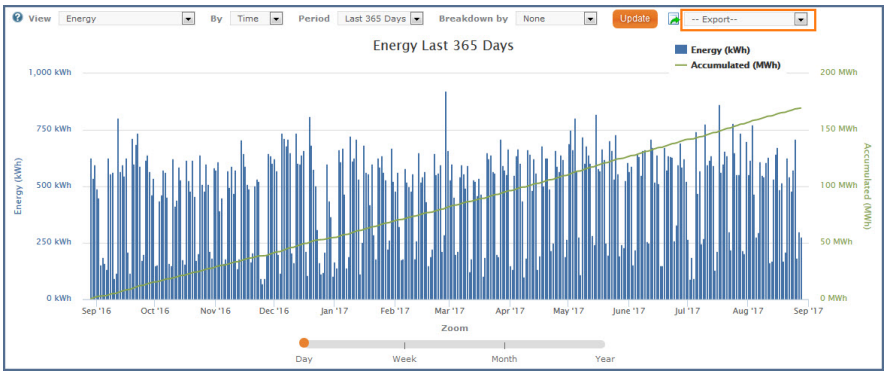
   The following example shows each bar representing data for the week.



Sharing Reports with Others

You can export reports in graphical and text formats.

1. Log in to ChargePoint.
2. Decide the type of report to share:
   + To share reports on fleet activity, click **Fleets** > **Reports**.
   + To share reports on station activity, click **Reports**.
3. Select the graph you want to view from the **View** drop-down list.
4. Select the duration to include the data from the **Period** drop-down list.
5. Click **Update**.



6. Select a format from the **Export** drop-down list.
7. Click **OK** to save the file.

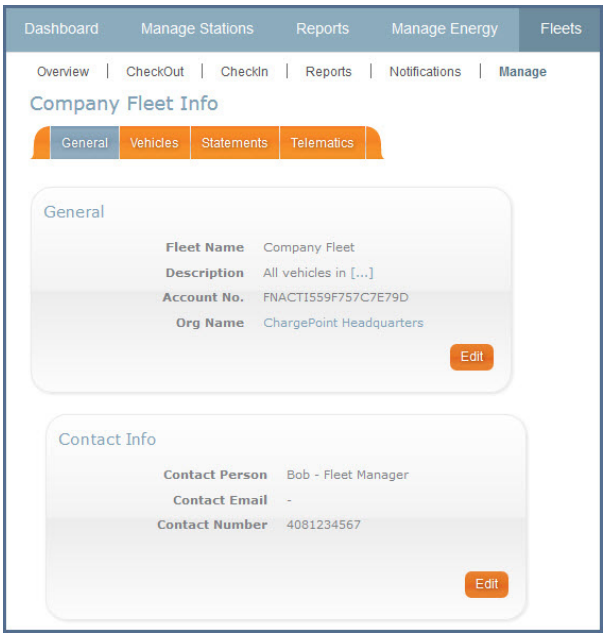
Making Changes to your Fleet and Vehicles

You can make changes to your fleet and its vehicles in ChargePoint. This section includes the following topics:

+ Editing or Viewing a Fleet on page 30
+ Adding a Vehicle to a Fleet on page 31
+ Removing a Vehicle from a Fleet on page 32
+ Editing or Viewing a Vehicle on page 33

Editing or Viewing a Fleet

1. Log in to ChargePoint.
2. Click **Fleets** > **Manage**.
3. Click the **Fleet** tab, and then click the name of the fleet you want to modify or view.

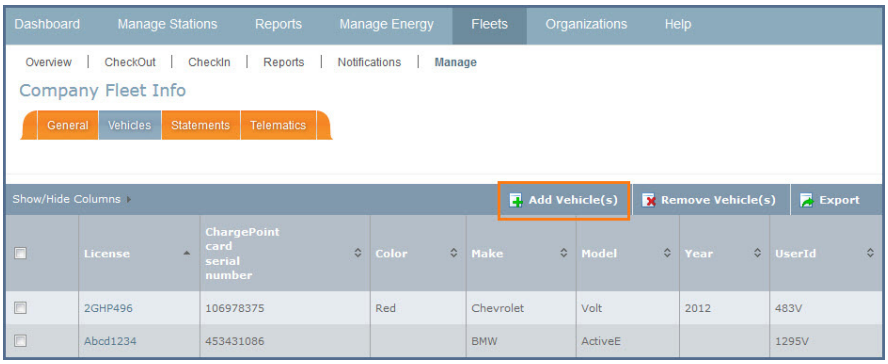


4. Click the intended tab to make changes.

Adding a Vehicle to a Fleet

To add a vehicle that you've already created to a fleet:

1. Log in to ChargePoint.
2. Click **Fleets** > **Manage**.
3. Click the **Fleet** tab, and then click the name of the intended fleet.
4. Click the **Vehicles** tab.



5. Click **Add Vehicle(s)**.

   The **Add Vehicle** form opens displaying a list of your vehicles.
6. Click the check box to select the vehicle you want to add, click **Add**.

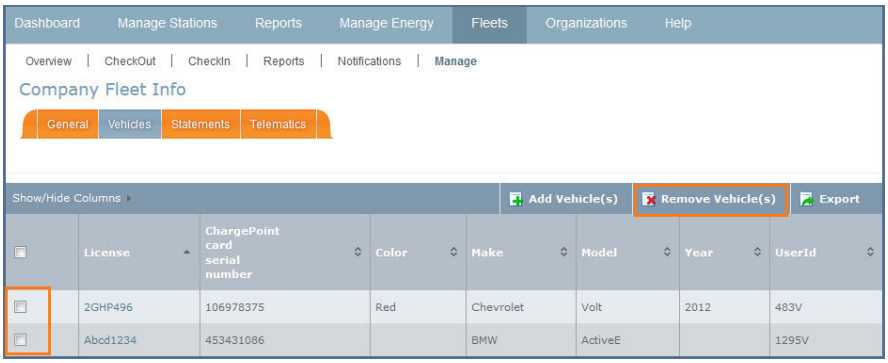
   The vehicle is displayed on the **Company Fleet Info** page.
7. Click **Save**.

Removing a Vehicle from a Fleet

Removing a vehicle also disables the ChargePoint Fleet card(s) assigned to it; however, the card can be reuse and assign to a different vehicle. Contact ChargePoint Customer Support to re-enable the card.

To remove a vehicle from a fleet:

1. Log in to ChargePoint.
2. Click **Fleets** > **Manage**.
3. Click the **Fleet** tab, and then click the name of the intended fleet.
4. Click the **Vehicles** tab.

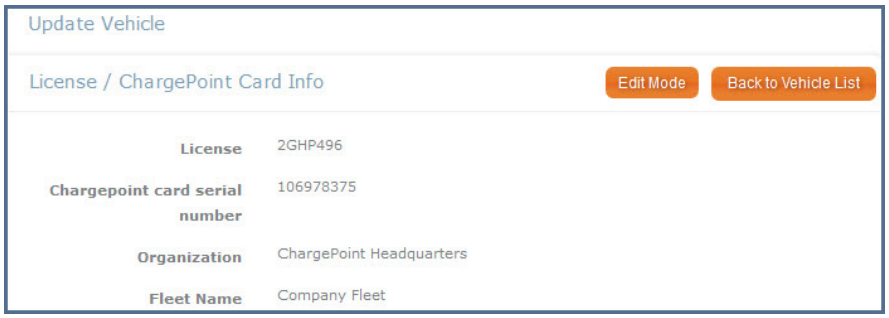


5. Click the check box to select the vehicle you want to remove, click **Remove Vehicle(s)**.
6. Click **Save**.

Editing or Viewing a Vehicle

To view or change the details of a vehicle:

1. Log in to ChargePoint.
2. Click **Fleets** > **Manage**.
3. Click the **Vehicle** tab, and then click the name of the vehicle you want to modify or view.



4. Click **Edit Mode** to make changes then click **Update Vehicle**, or click **Back to Vehicle List** when you are done reviewing.

Reducing Costs with Scheduled Charging

Setting up scheduled charging allows your company to save money on fuel costs while still being convenient for your fleet drivers. They can plug in as soon as they return to the depot; your stations then take care of delaying charging until electricity rates are cheap.

When the scheduled charging policy is enabled, you can easily override the policy on a specific vehicle, as necessary. You can also make changes to the existing policy or remove it.

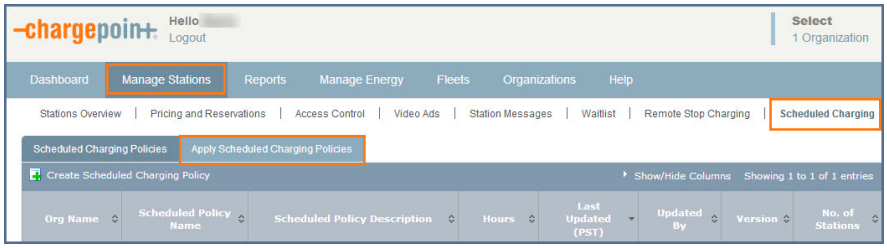
Additionally, fleet managers don't need to configure the charging timer in their vehicles, a process that may vary by make and model. Setting the vehicle's charging timer may also prevent the vehicle from charging at any time while on route without the driver explicitly overriding it.

This chapter explains how to configure your CPF25 charging stations so that your drivers can plug in their fleet vehicle at any time but charging is delayed until off-peak electricity rates apply (for example, 9 pm).

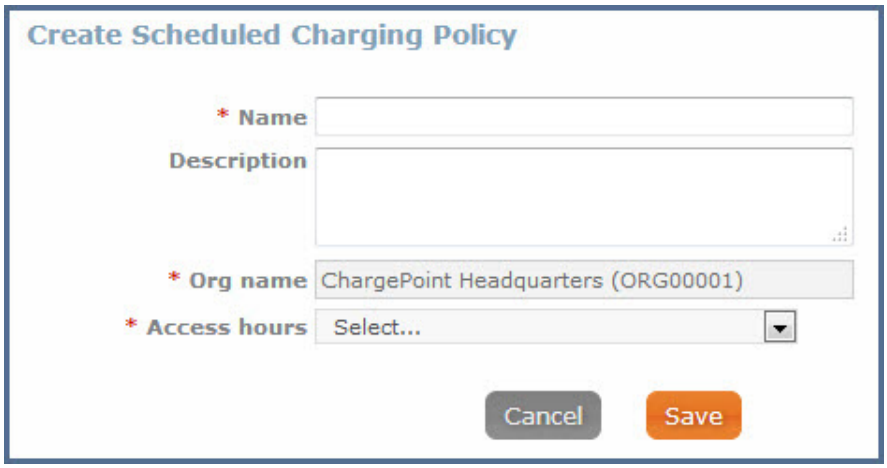
+ Creating a Scheduled Charging Policy on page 36
+ Applying the Scheduled Charging Policy on page 37
+ Overriding Scheduled Charging on page 38
+ Making Changes to an Existing Scheduled Charging Policy on page 39

Creating a Scheduled Charging Policy

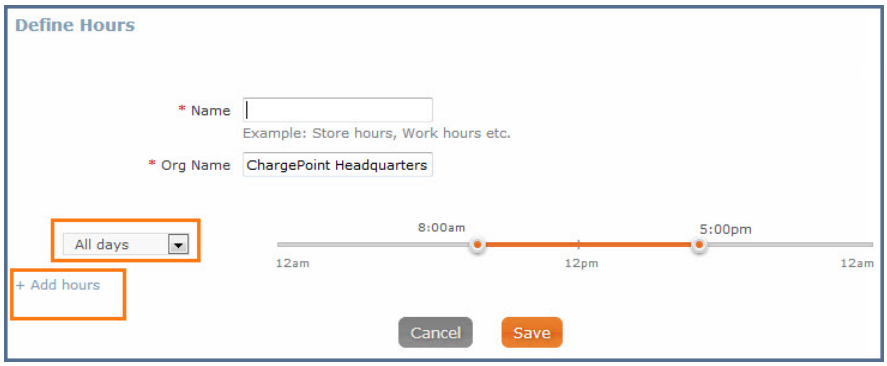
1. Log in to ChargePoint.
2. Click **Manage Stations** > **Scheduled Charging**.



3. Click **Create Scheduled Charging**.



4. Enter a name and an optional description of the policy in their respective fields.
5. Select **Define hours** from the **Access hours** drop-down list.

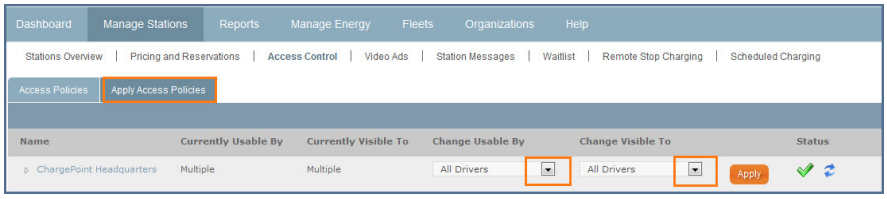


6. Enter the following information in the **Define Hours** form:
   + Enter a name that will help you remember which hours are defined.
   + Define the day and time when charging will be **allowed** at your stations by using the drop-down list and the sliding time-segment bars.
7. Click **Add hours** to add more charging hours to the same time frame or to define charging hours for a different time frame.
8. Click **Save** to save your charging hour definition and exit the **Define Hours** form.
9. Click **Save** to save the scheduled charging policy.

   Your new policy appears in the list on the Scheduled Charging Policies page.

Applying the Scheduled Charging Policy

1. Click the **Apply Scheduled Charging Policies** tab.



2. Select a policy from the drop-down list, click **Apply**.

   A green check mark appears beside the station when the policy is successfully applied.

Overriding Scheduled Charging

When a vehicle is plugged in during a time when the station is scheduled to not dispense power, the LED ring on the station becomes solid blue, indicating that the vehicle is not (yet) charging. You can override the scheduled charging locally (at the station) or remotely (away from the station), allowing the vehicle to begin charging immediately.

At the station

To override the scheduled charging policy at the station (to begin charging immediately), the following must be done **at the time the session is started**:

1. Tap the vehicle's ChargePoint card on the station's card reader.

   The station beeps once if the card tap was successful.

2. Plug the connector into the vehicle, wait a few seconds, unplug the vehicle, then plug it back in.

   This **double-pump** automatically overrides scheduled charging for this specific charging session only and allows the vehicle to charge immediately.

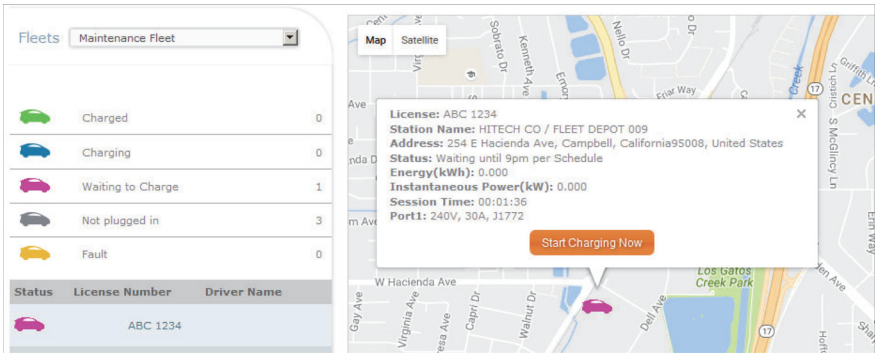
   The LED ring on the station pulses blue to show that the vehicle is charging.

Away from the station

1. Log in to ChargePoint.

2. Click **Fleet** > **Overview**.

   The page shows vehicles that are plugged in to a station with a scheduled charging policy but are not yet charging. The purple icon indicates that the vehicle waiting to charge.



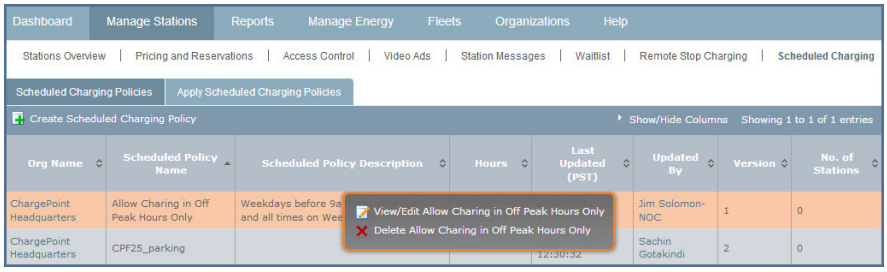
3. Locate the vehicle icon you want to charge immediately by clicking its purple icon on the map to display the message.
4. Click **Start Charging Now** to override the scheduled charging policy and begin charging immediately,

   The vehicle's icon turns blue indicating that the vehicle is charging.

Making Changes to an Existing Scheduled Charging Policy

You can easily remove or change the scheduled charging policy that has been applied to your stations.

1. Log in to ChargePoint.
2. Click **Manage Stations** > **Scheduled Charging**.
3. Click anywhere on the station to display the menu.



4. Choose an action.

Integrating Telematics

ChargePoint integrates with leading telematics providers to enable advanced features such as automatic odometer capture and fraud prevention. (In this instance, 'fraud' is defined as a fleet driver using a Fleet Card to charge a personal vehicle.)

This section provides information and instructions for telematics integration, which includes the following tasks:

+ Installing Supported Telematics Devices on page 41
+ Enabling Telematics Integration for the Fleet on page 42
+ Enabling Telematics for Individual Vehicles on page 44

Installing Supported Telematics Devices

Currently, ChargePoint has integrated with FleetCarma and is compatible with the FleetCarma C5 device. To enable telematics integration, you need to obtain and install supported telematics devices in all your fleet vehicles. For more information, contact your ChargePoint Sales Representative.

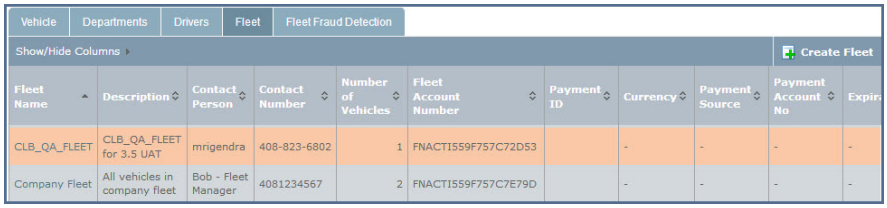
Enabling Telematics Integration for the Fleet

To set up telematics integration on ChargePoint, you need the user name and password that you use to access your telematics reports.

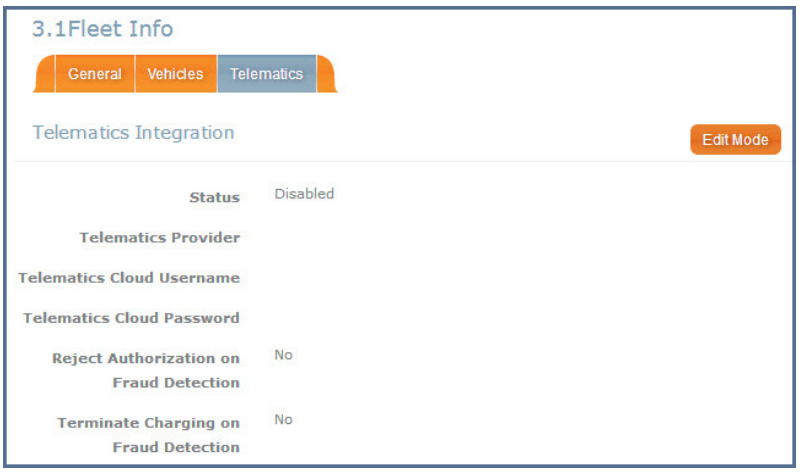
1. Log in to ChargePoint.
2. Click **Fleets** > **Manage**.



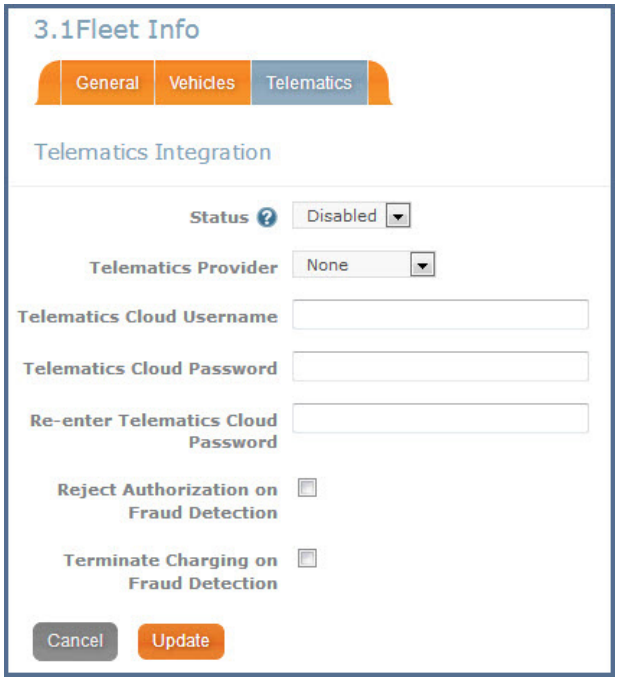
3. Click the **Fleet** tab.



4. Click the name of the fleet for which you want to enable telematics.
5. Click the **Telematics** tab.



6. Click **Edit Mode**.



7. Select **Enabled** from the **Status** drop-down list.
8. Select **FleetCarma** from the **Telematics Provider** drop-down list.
9. Enter Telematics Cloud user name and password in their respective fields; the same ones that you use to log on to your Telematics Provider's website.

   ChargePoint needs this information to retrieve data such as vehicles' odometer information, state of charge, and GPS location from the Telematics Provider.
10. Optionally, select the check box to reject a Fleet card authorization if fraud is detected.
11. Optionally, select the check box to terminate the charging session if fraud is detected.

Note
ChargePoint recommends that you leave the two boxes unchecked initially while becoming familiar with the telematics integration. You can use them later to prevent fraud if it is detected. Without these two boxes checked, fraud will be detected and reported, but not stopped.

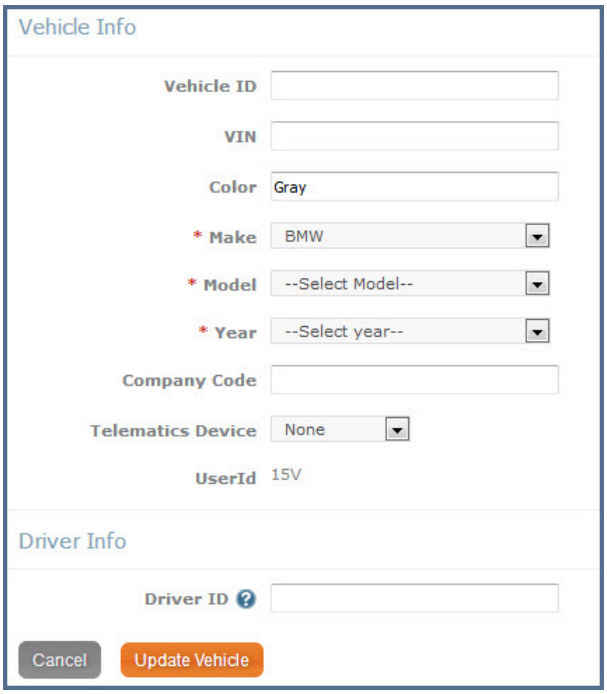
Enabling Telematics for Individual Vehicles

You need the VIN of each fleet vehicle to complete this task. You must do this for each one of your fleet vehicles.

1. Click **Fleets** > **Manage**.



2. In the list of vehicles, click the license plate of the intended vehicle.
3. Click **Edit Mode**.



4. Enter the vehicle ID and VIN in their respective fields.
5. Select **FleetCarma** from the **Telematics Device** drop-down list.
6. Click **Update Vehicle**.

   A green check mark in the Telematics Status column means that all vehicle information is entered correctly.
7. Repeat steps 2 through 6 until all your fleet vehicles are set up.

Configuring Power Management

ChargePoint Power Management enables money saving on both capital and operating expenses. You can install more stations while deferring or avoiding electrical equipment and service upgrades. You can also avoid costly demand charges by setting a threshold for peak power delivery.

Power Management can be enabled at multiple levels, and can satisfy all configured power constraints simultaneously. Power Management includes the following levels:

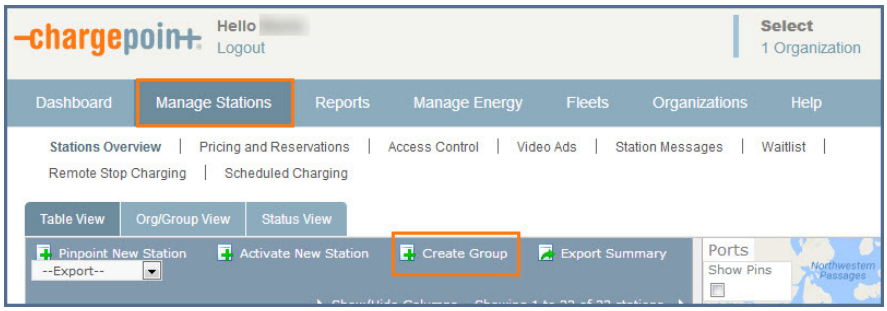
+ **Circuit Sharing**—One 240V/208V 40A circuit is shared among multiple charging stations. ChargePoint software ensures that the aggregate power delivered never exceeds 40A.
+ **Panel Sharing**—One panel with a limited capacity available for EV charging can have that capacity shared among more chargers than would otherwise be possible. As an example, if a panel has 200A of EV charging capacity, it would ordinarily allow only five 40A charging stations to be installed. However, ChargePoint Panel Sharing software can allow that 200A to be shared across five, ten, even fifteen charging stations, without upgrading the panel or the service behind it.
+ **Site Sharing**—In this case, there may or may not be a physical constraint (that is, a constraint on the total power available to a site) but rather the customer wants to avoid all chargers running at full speed during certain times of day to prevent costly demand charges. Here customers can define a power limit to be shared among some or all of the chargers at a site or across sites, regardless of what panel or circuit they are connected to.

This section provides information and instructions for configuring power management, which includes the following tasks:

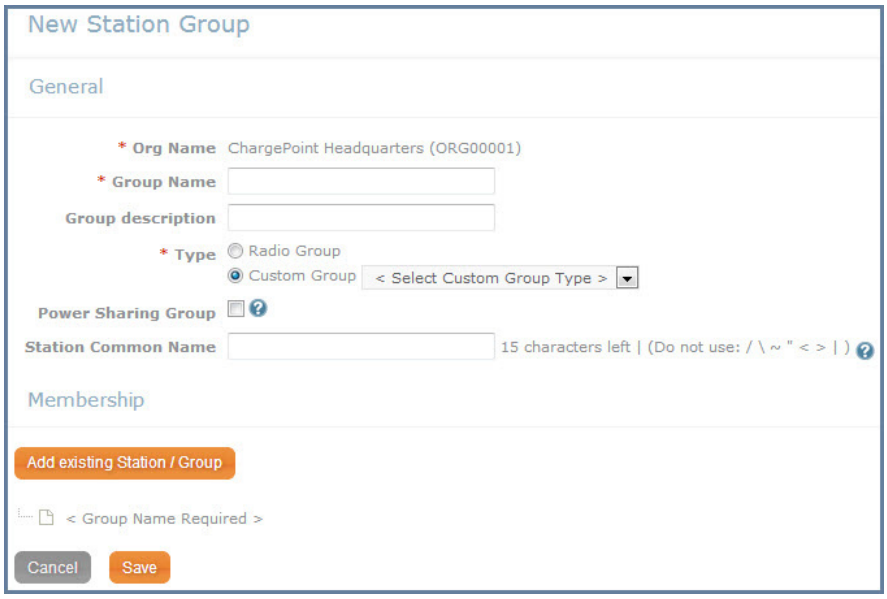
+ Creating a Power Sharing Group on page 46
+ Defining Energy Sharing on page 47
+ Share energy at the panel on page 47
+ Define a maximum power amount on page 49

Creating a Power Sharing Group

1. Log in to ChargePoint.
2. Click **Manage Stations**.



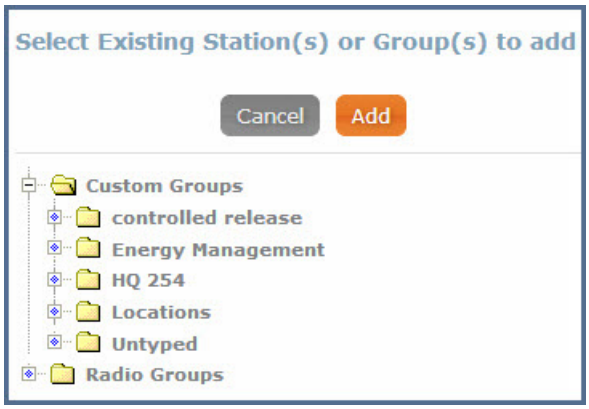
3. Click **Create Group**.



4. Enter a name and an optional description for the group.
5. Select **Custom Group** as the group type.
6. Check to select the **Power Sharing Group** check box to enable the power management feature.

Note
Leave the Station Common Name field blank unless you want to change the station name of all the stations in the group.

7. Click **Add Existing Station/Group**.



8. Select the stations you want to add to the group. You can choose entire custom or radio groups or you can expand those groups to show individual stations and select only the stations you want.
9. Click **Add**, then click **Save**.

   The new energy group is saved and ChargePoint contacts the stations in this group to enable power management.

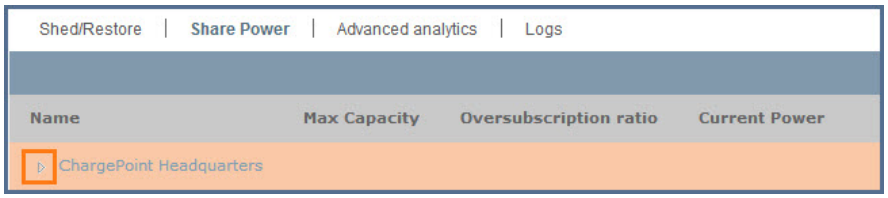
Defining Energy Sharing

You define how you want to share energy—from the panel or transformer/site level.

Share energy at the panel

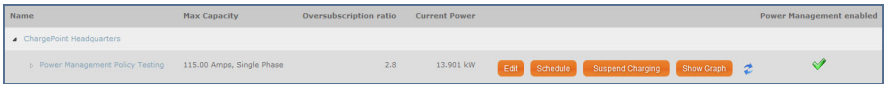
When Panel is selected, energy is shared from a single electrical panel among multiple stations sites.

1. Click **Manage Energy** > **Share Power**.

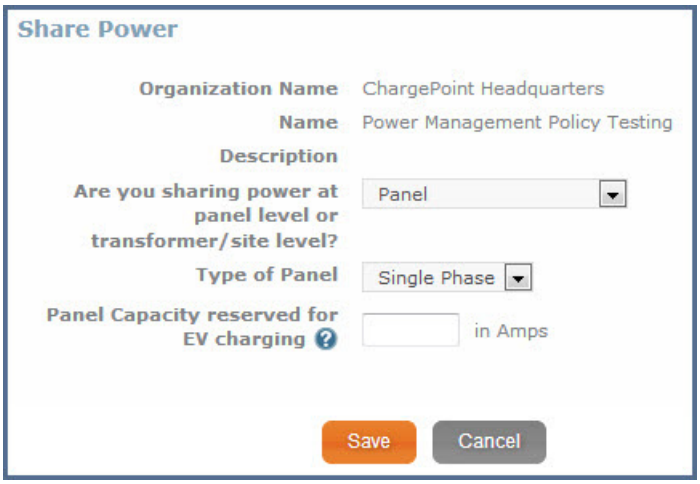


2. Click ▷ next to the organization's name to expand the energy group that you created.

   A green check mark appears in the Power Management enabled column if power management has been enabled for your group. The absence of the check mark indicates power management is disabled or ChargePoint is still in the process of enabling power management for this group.



3. Click **Edit** of the intended energy group.
4. Select **Panel** from the drop-down list.

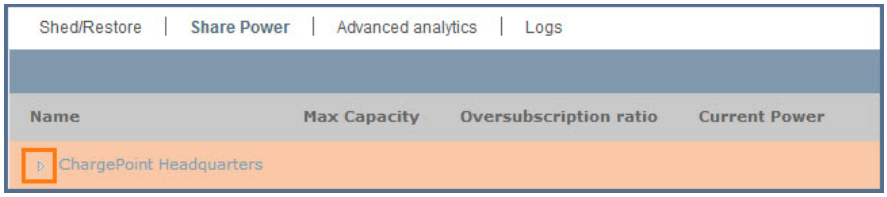


5. Select the type of panel. Options are **Single Phase** or **Three Phase**.
6. Enter the panel's total capacity in Amps that are available for vehicle charging.
7. Click **Save**.

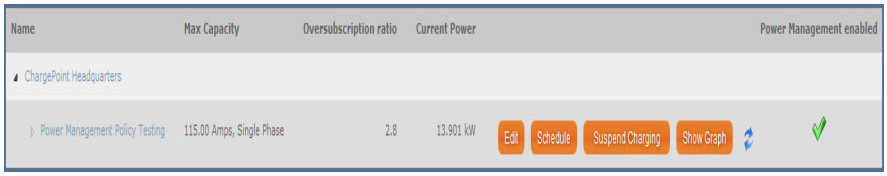
Define a maximum power amount

You can define a maximum power amount to be shared among stations at a site or across sites.

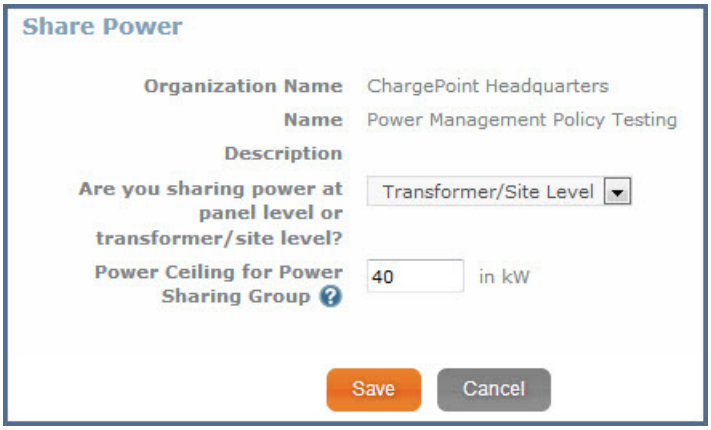
1. Click **Manage Energy** > **Share Power**.



2. Click ▷ next to the organization's name to expand the energy group that you created.



3. Click **Edit** of the intended energy group.



4. Select **Transformer/Site Level** from the drop-down list.
5. Enter a value to be shared among the stations at a site or across sites.
6. Click **Save**.

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