

Fleet Management dashboard

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Introduction

The Fleet Management dashboard helps our installer partners and asset owners conveniently manage their fleets and keep track of their performance.

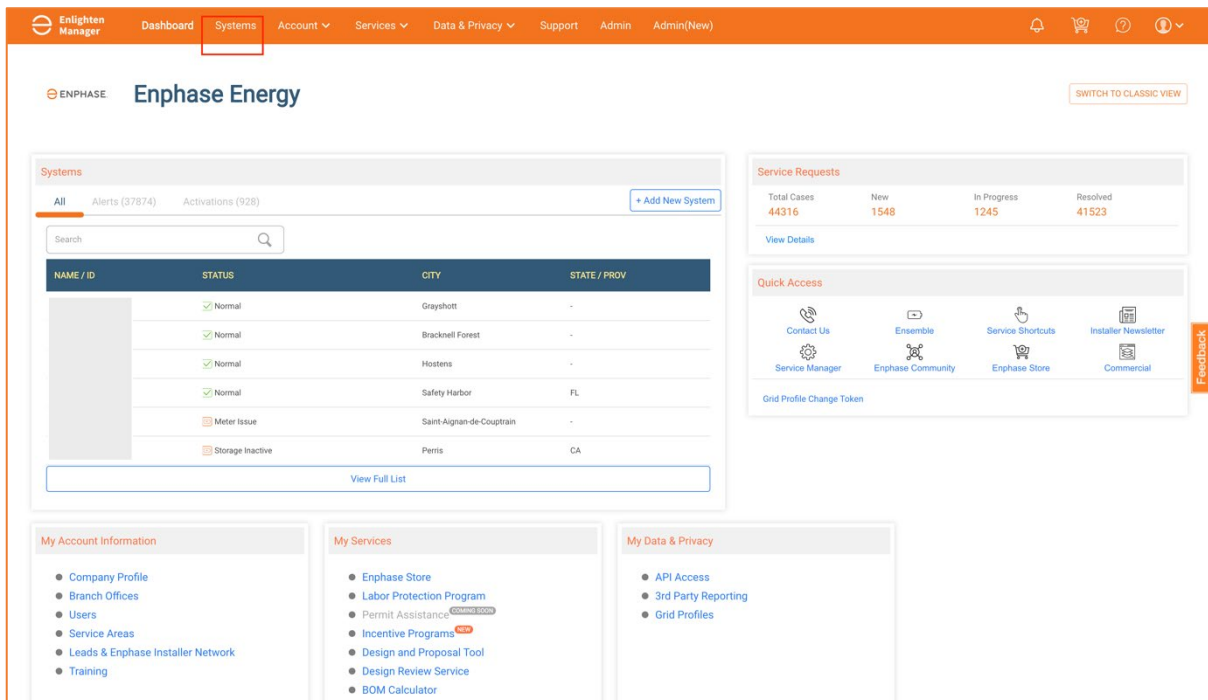
Key highlights

- **Filters:** Filters the relevant site data including system status, system type, location, and so on, across each view.
- **Overview:** Provides a customizable aggregate view of the installer's fleet based on different metrics.
- **Map View:** Enables installers to visualize the fleet within a map view, with individual system-level information available. The widget enables users to group sites into clusters and view cluster-level information.
- **System List:** Provides individual site-level information in a list view.

Fleet Management dashboard

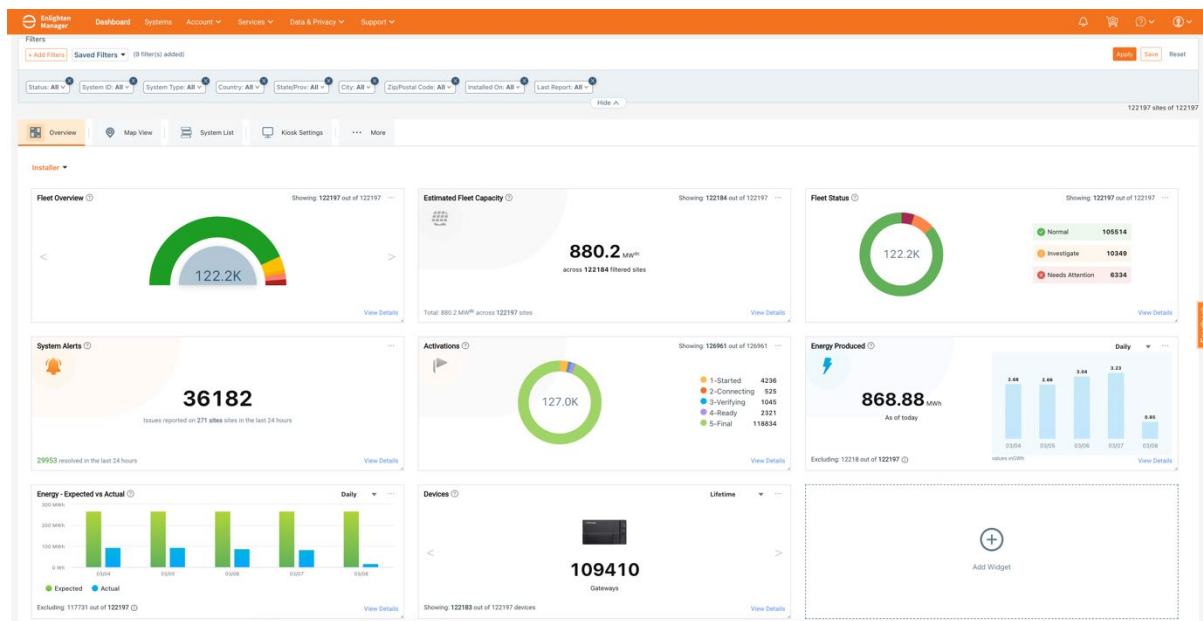
Entry point

To access the Fleet Management dashboard, log in to the Enphase Installer Portal and click the "Systems" tab.



The screenshot shows the Enphase Energy Fleet Management dashboard. The top navigation bar includes links for Dashboard, Systems (selected), Account, Services, Data & Privacy, Support, Admin, and Admin(New). The main content area is divided into several sections:

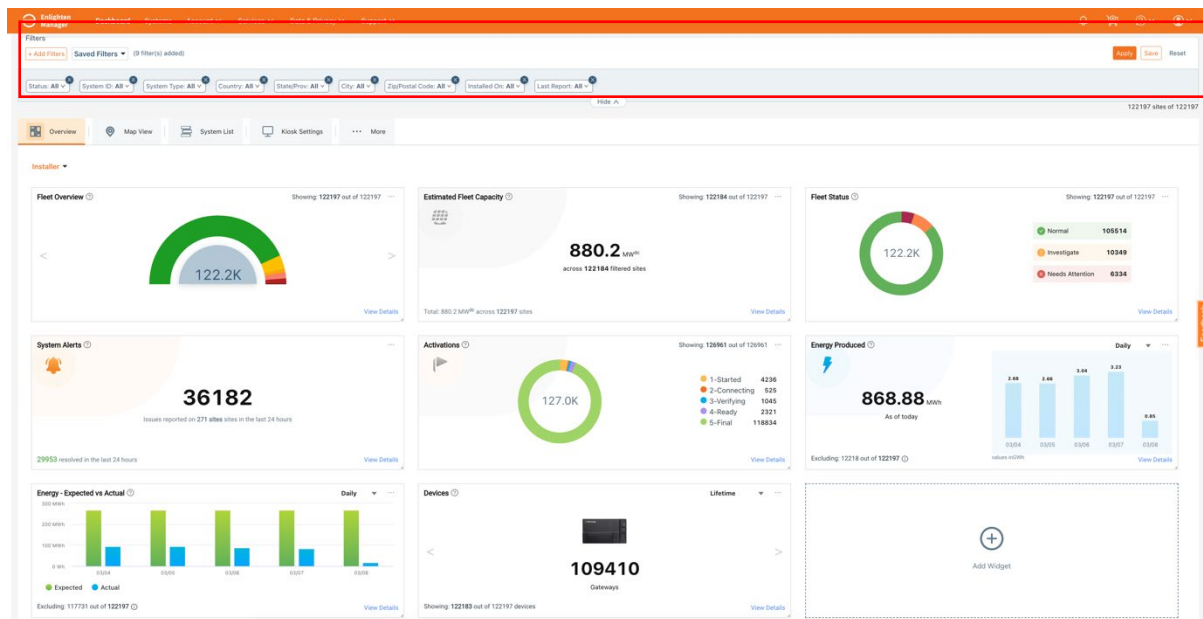
- Systems:** A table listing systems with columns for NAME / ID, STATUS, CITY, and STATE / PROV. The table shows several systems with a status of 'Normal' and one with a status of 'Storage Inactive'. A search bar and a '+ Add New System' button are also present.
- Service Requests:** A summary table showing Total Cases (44316), New (1548), In Progress (1245), and Resolved (41523). A 'View Details' link is provided.
- Quick Access:** A section with icons for Contact Us, Ensemble, Service Shortcuts, Installer Newsletter, Service Manager, Enphase Community, Enphase Store, and Commercial.
- My Account Information:** A section with links for Company Profile, Branch Offices, Users, Service Areas, Leads & Enphase Installer Network, and Training.
- My Services:** A section with links for Enphase Store, Labor Protection Program, Permit Assistance, Incentive Programs, Design and Proposal Tool, Design Review Service, and BOM Calculator.
- My Data & Privacy:** A section with links for API Access, 3rd Party Reporting, and Grid Profiles.



Feature description

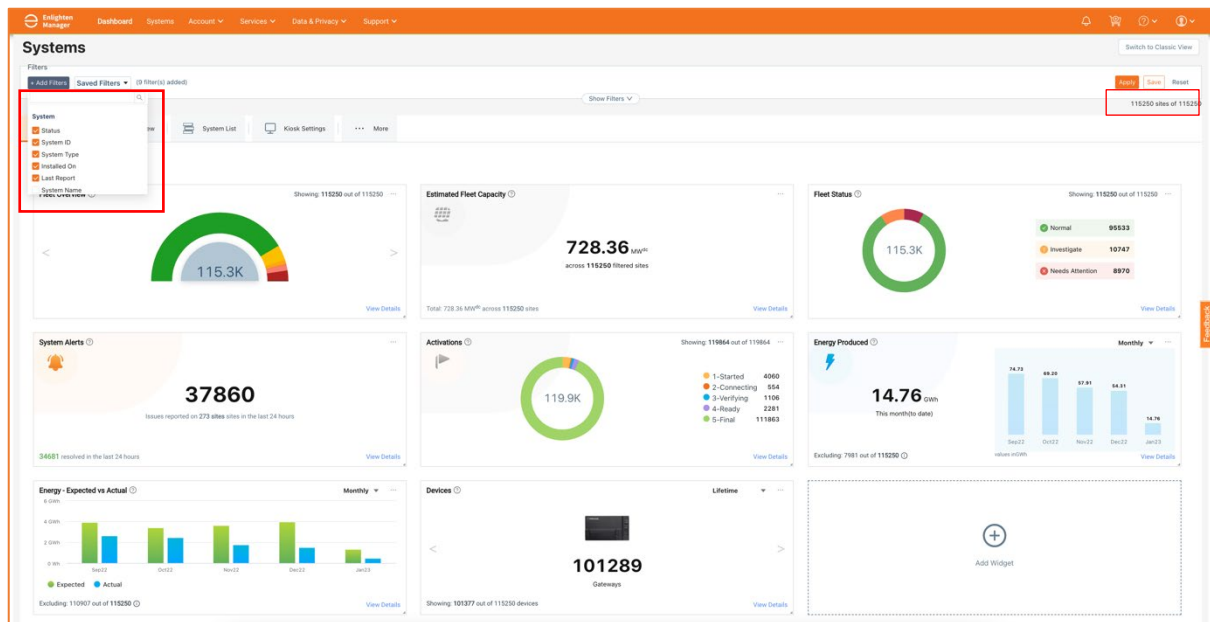
Filters

This feature allows data filtering across all the individual tabs (“Overview”, “Map View”, and “Systems List”) in the Fleet Management dashboard. It is present in the topmost section of the screen.



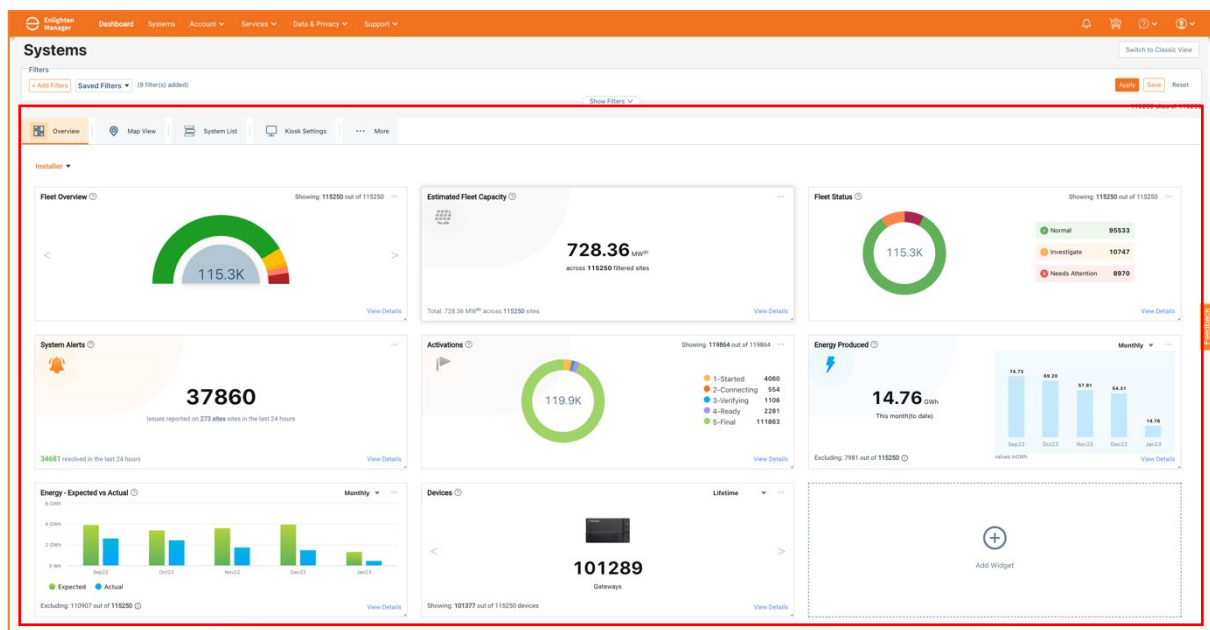
Based on preferences, to allow customizable views for each, users can add or edit global filters to the dashboard.

- To add/edit filters, click “Add Filters” at the top-left of the screen, select the checkbox next to each option, then click the “Apply” button.
- To reset the applied filters, click the “Reset” button.
- To save filters, click the “Save” button and add the filter name.
- To select the saved filters, click the “Saved Filters” drop-down menu to select the saved filters.



Overview tab

The “Overview” tab provides a default view specific to a user role type, with specific widgets on the dashboard. These widgets help the user keep track of the performance of their fleet through several metrics.



Different roles assigned to each user

Users or companies are assigned the following roles.

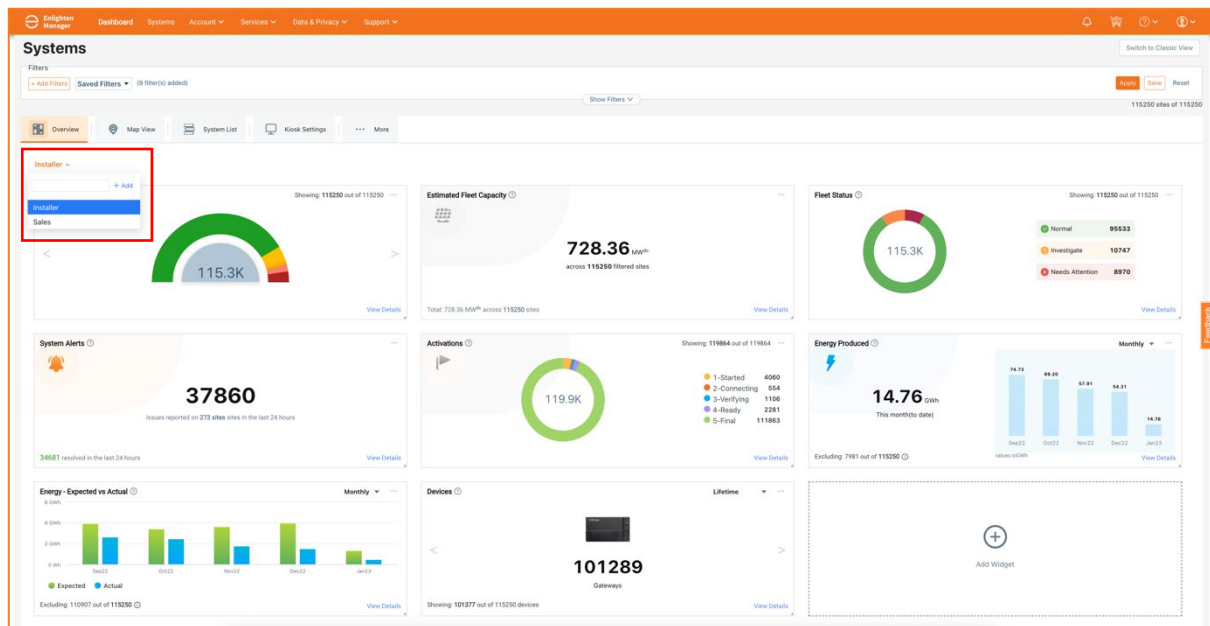
- Installer: Responsible for the installation of Enphase systems. The default view for an installer has the following widgets visible under each head.
 - What is the status of my fleet?
 - Estimated Fleet Capacity
 - Fleet Overview
 - Fleet Status
 - How effectively is my fleet performing?
 - Energy Produced

- Energy – Expected vs. Actual
 - Others
 - Devices
 - Activations
- Fleet Manager: Assigned to a user/company that performs the role of system maintainer.
 - What is the status of my fleet?
 - Estimated Fleet Capacity
 - Fleet Overview
 - Fleet Status
 - How effectively is my fleet performing?
 - Energy Produced
 - Energy – Expected vs. Actual
 - Others
 - Devices
- Fleet Owner: The owner of the system. For non-PPA/leased systems, the fleet owner is the homeowner of the system. For PPA/leased systems, the homeowner is the system host, and the leased company is the system owner.
 - What is the status of my fleet?
 - Estimated Fleet Capacity
 - Fleet Status
 - How effectively is my fleet performing?
 - Energy Produced
 - Energy – Produced vs. Consumed
 - Energy – Expected vs. Actual
 - How much value is my fleet generating?
 - Site Leader Board (based on normalized savings/efficiency)
 - Environmental Impact
 - Environmental Benefits
- Third-Party Companies: These are companies/users having access to a system that is not PPA/leased site.
 - What is the status of my fleet?
 - Estimated Fleet Capacity
 - Fleet Status
 - How effectively is my fleet performing?
 - Energy Produced
 - Energy – Expected vs Actual

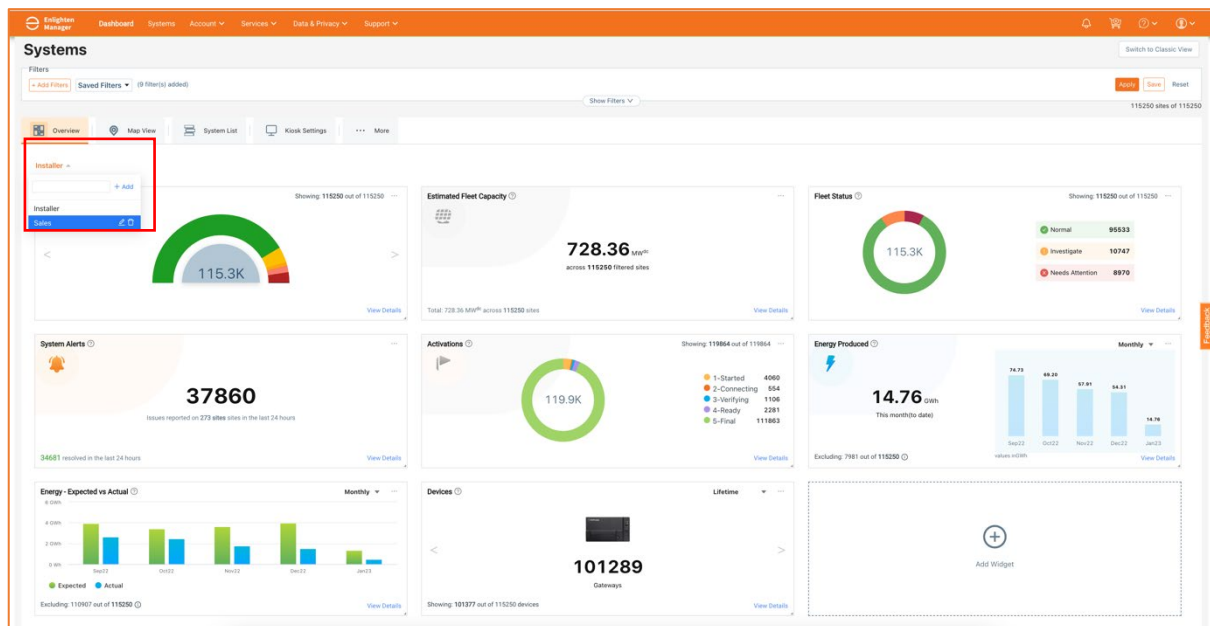
Add/edit profiles in the Overview tab

Users can use the Fleet Management dashboard for operations/maintenance, marketing, and sales. The dashboard allows users to create multiple profiles with different widgets for different use cases.

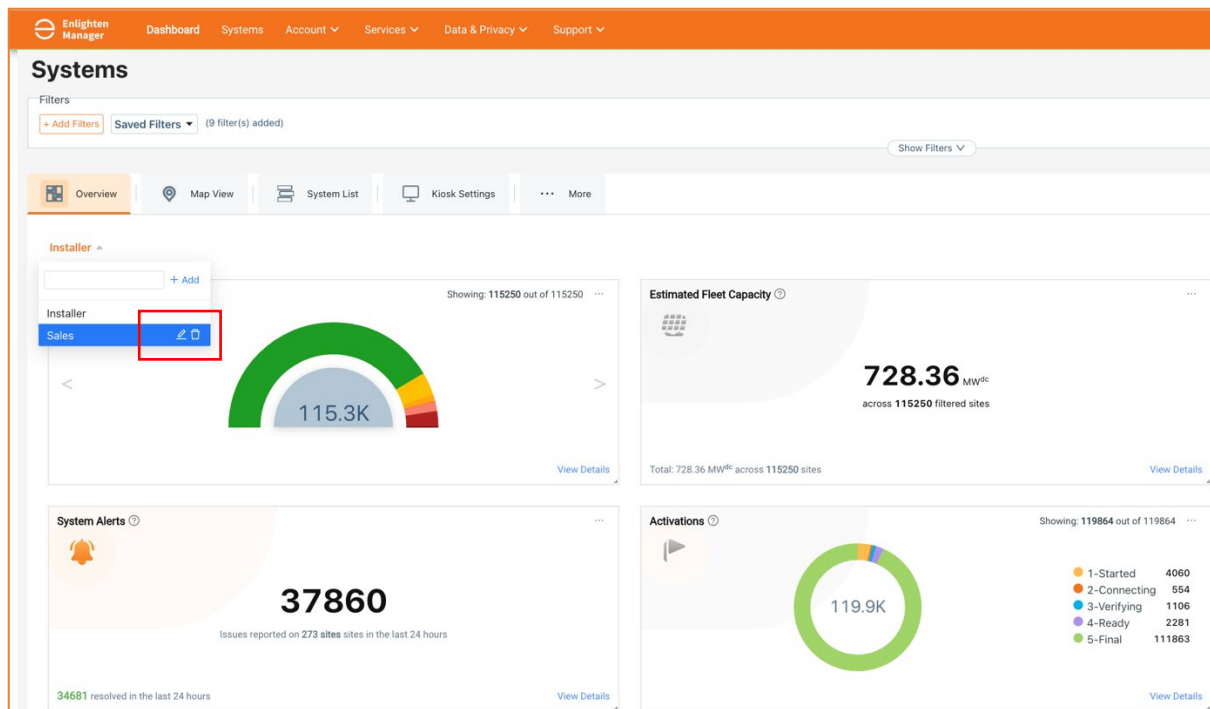
- To add a new profile, click the top-left drop-down menu below the “Overview” tab, enter the name for the user profile, and click “Add”.



- To navigate to a particular user profile, click the drop-down menu in the top left below the “Overview” tab and select the profile.

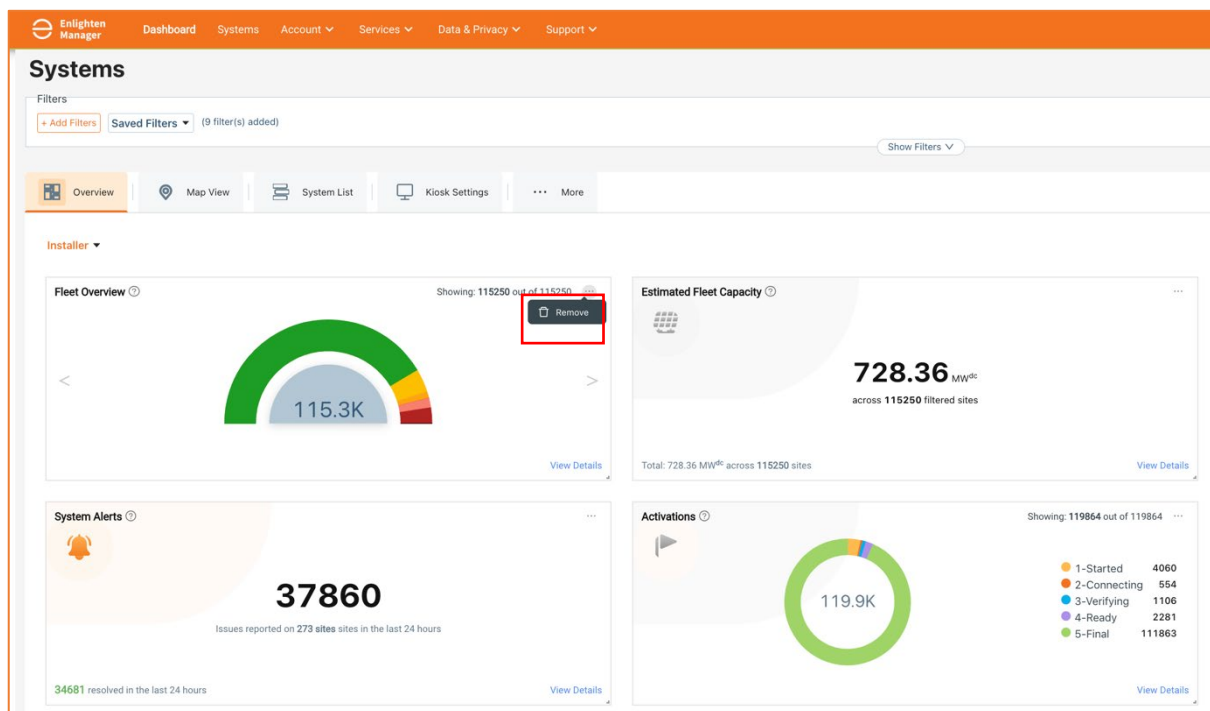


- To edit a profile name or delete a particular profile, click the edit icon or trash icon respectively next to the profile name.



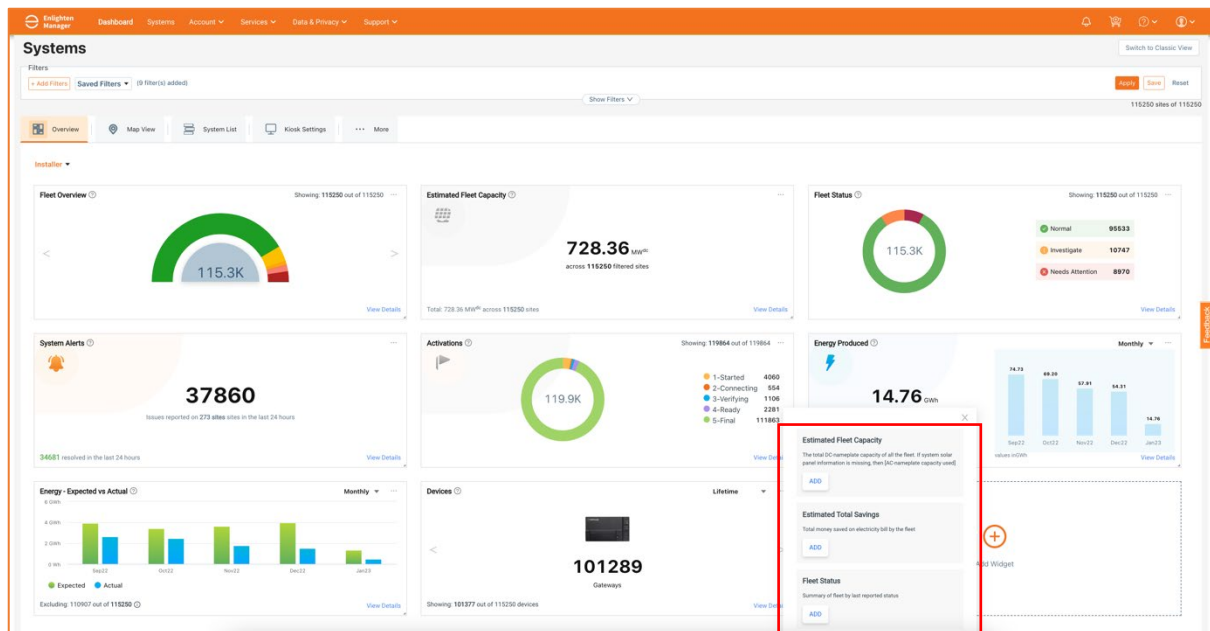
Removing widgets in the Overview tab

To remove a widget, click the top-right corner of the widget and click the “Remove” button. This action removes the widget from the particular profile/view.



Adding widgets in the Overview tab

- To add a new widget, click “Add Widget”, select the widget best suited for your needs, and then click the “Add” button.
- Add the chosen widget to the relevant dashboard view as needed.



Different widgets in the Overview tab

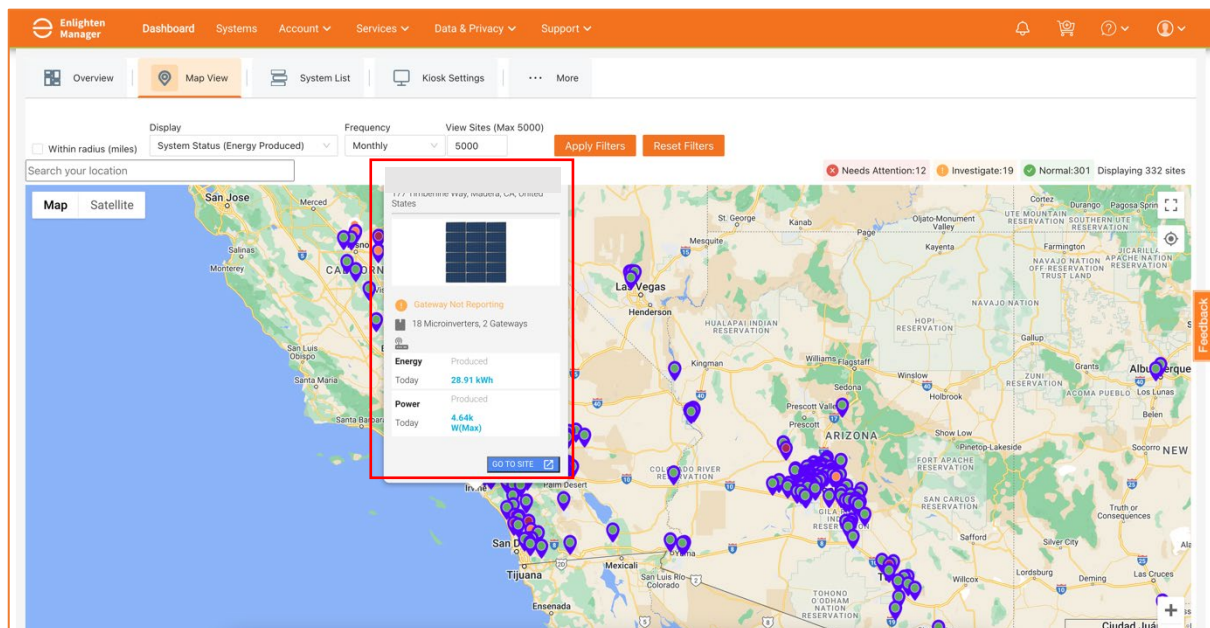
- Estimated Fleet Capacity widget:** Enables installers to view the fleet capacity at an aggregate level for all their systems. Click “more details” to get data at a more granular level for each system.
- Fleet Status widget:** Enables users to view the status of their fleet at an aggregate level for all their systems. The three statuses are defined below:
 - Normal:** For sites with system status as Normal
 - Investigate:** For sites with system status as follows:
 - Microinverters not reporting
 - ACB not reporting
 - Envoy not reporting
 - Encharge not reporting
 - Enpower not reporting
 - Needs Attention:** For remaining site statuses
- Energy Produced widget:** Provides details of the energy produced by the user’s fleet. The user can view the fleet’s daily, monthly, or yearly energy production data.
- Energy Produced vs. Consumed widget:** Allows users to view the expected energy produced versus the energy consumed by their fleet. Additionally, users can see the energy produced versus consumed for the past five months as a bar graph for their entire fleet.
- Energy Expected vs. Actual Produced widget:** Allows installers to view the expected energy produced versus the actual energy produced by their fleet, presented as a bar graph for the past five months.
- Activations widget:** Allows users to see the number of ongoing activations grouped by stages across their entire fleet. The users will see Start, Connecting, Verifying, Ready, and Final. Users will see this data in a donut chart and as a list next to the donut chart.
- Fleet Overview widget:** Displays the fleet size in kW DC and the total number of sites for the user. The system will have a status of the fleet along with a widget highlighting the number of sites in each status in the form of a list.
- Environmental Benefits widget:** Enables the users to view the environmental benefits achieved. The widget shows the carbon offset per year in tons, the number of trees planted, and the number of cars off the road, calculated based on the convertible date from energy kWh.

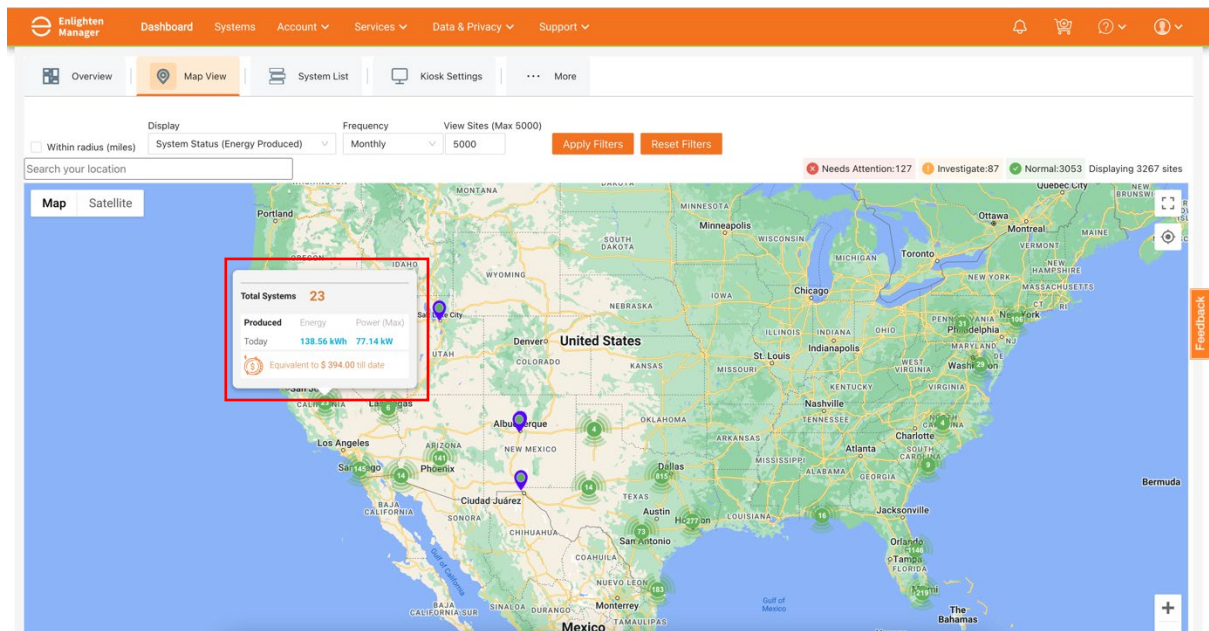
- **System Alerts widget:** Allows the users to see the number of alarms (with warning severity) reported in the last 24 hours for all the user's fleets. Users can also see the number of resolved alarms with warning severity in the past 24 hours.
- **Site Leader widget:** The widget has two options, "Yield" and "Savings", which users can select via a toggle button.
 - **Site Leader Yield widget:** Allows the fleet owner to view the energy produced per kW DC size at each site for their entire fleet allowing the user to compare the performances of their sites based on dollar savings. The user can see the yield (kWh/kW value) for a top-performing site in the entire fleet when "Yield" is selected.
 - **Site Leader Savings widget:** Allows users to view the dollars saved per kW DC size at each site for their entire fleet. The user can see the dollar savings (\$/kW) for a top-performing site in the entire fleet.
- **Devices Installed widget:** Allows the installers to view the number of devices installed across their entire fleet.
- **Estimated Savings widget:** Provides information about the total electricity bill savings due to the fleet installation. Users can also filter the widget at daily, monthly, or yearly levels at the top-right corner of the widget.

Map View tab

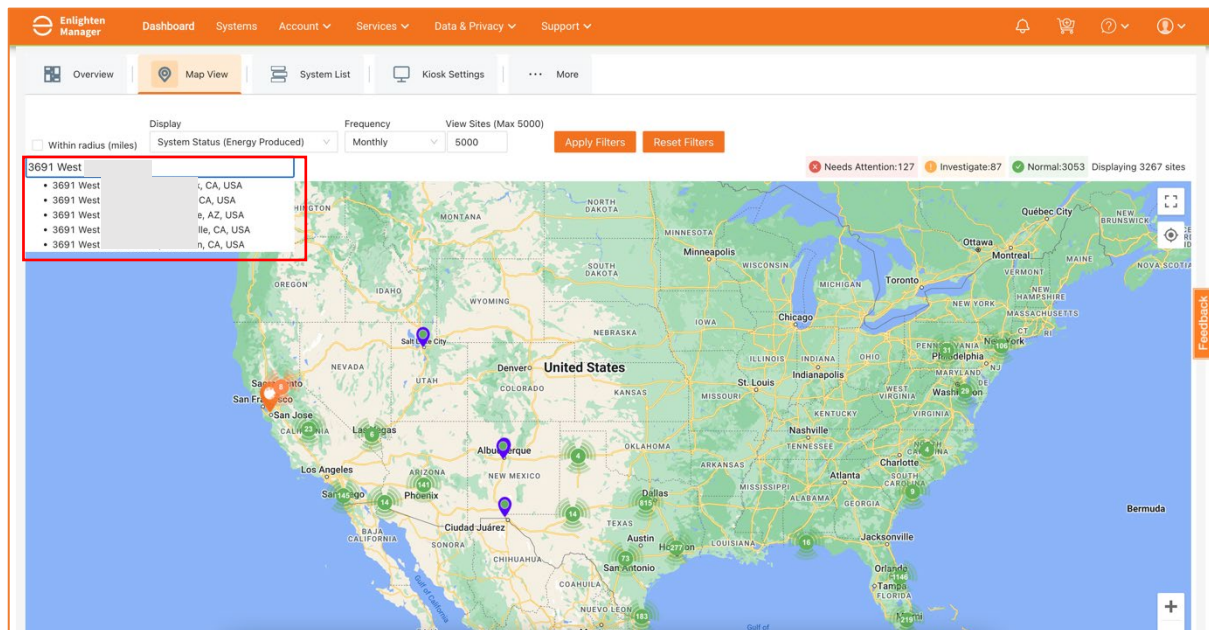
Enables seeing systems on a map. Users will have the option to view details of individual systems within the map view. Users can view a maximum of 5,000 sites on the map anytime. Systems located close to each other will appear as clusters.

- For a detailed view of the individual systems in the cluster, click the cluster to zoom in.
- To display the system/cluster details, hover over a particular system/cluster.



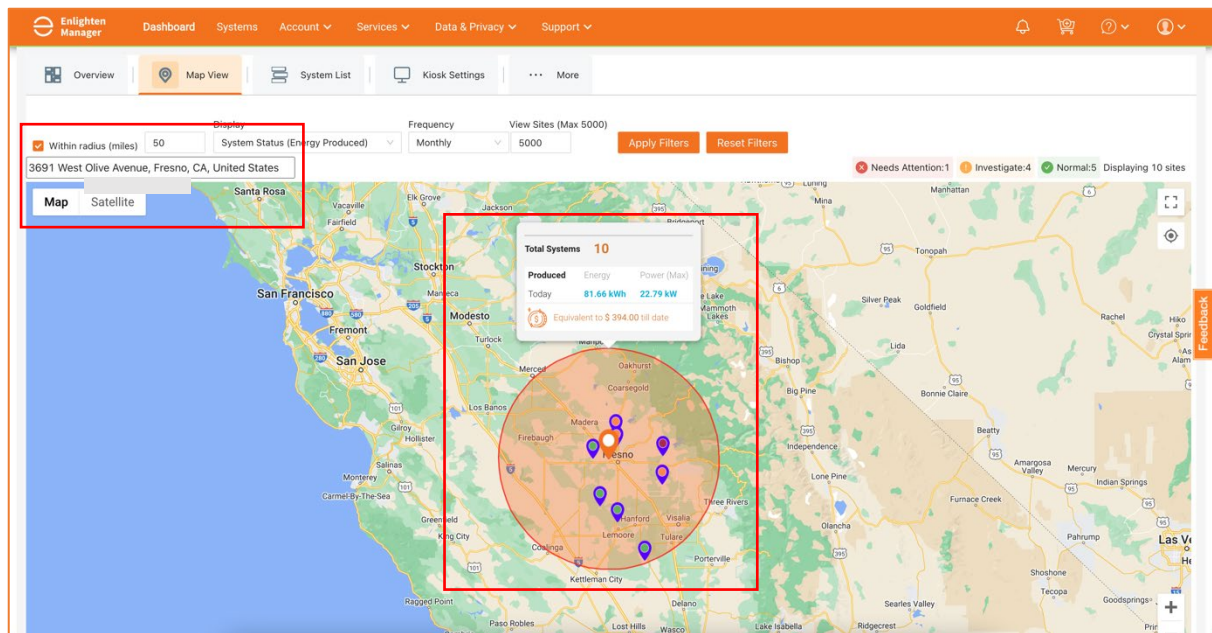


- To search with an address, enter the address in the search bar. See below.



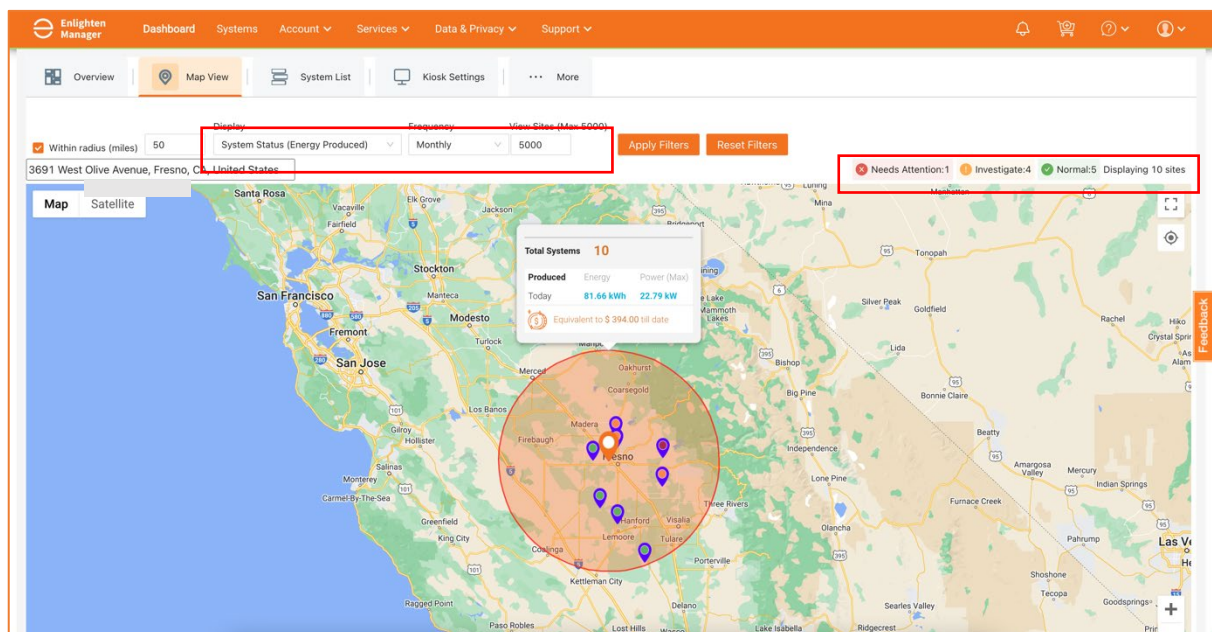
- To see systems in and around the chosen address, select the “Within Radius” checkbox and enter the radius.

The systems within the specified radius with the selected address are displayed. See below.



- To see systems with color-coded statuses, use the “System Status” display.
- The three statuses are:
 - Needs Attention (red)
 - Investigate (amber)
 - Normal (green)

Users can view Systems via Savings (\$) and Yield (KWh/KW DC) display at daily, monthly, yearly, or lifetime levels. View the top-performing sites based on the selected parameter. See below.



Systems List tab

The “Systems List” tab is identical to the existing view for the “Systems” tab in the Enphase Installer Portal. Some columns are present by default.

- To change the columns, click the button at the top right corner and select the checkbox next to each. See below.
- To create a systems group, click “Add Systems to a Group” and add systems.
- To filter out the systems belonging to the group, use the group available in the global filter.

Enlighten Manager

DashboardSystemsAccountServicesData & PrivacySupport

Switch to Classic View

Systems

Filters

+ Add Filters

Saved Filters

(9 filter(s) added)

Apply

Save

Reset

Show Filters

115250 sites of 115250

Overview

Map View

System List

Kiosk Settings

More

Add Systems to a Group

Total 115250 records

1

2

3

4

5

...

1153

>

100 / page

Status	City	State/Prov	Installed On	Last Report	Energy Produced - T...	Energy Produced - L...
Gateway Not Reporting	Granite Bay	CA	03/04/2010 12:45 PM PST	01/08/2023 12:43 AM PST		1.97 MWh
Production Issue	Willimantic	CT	09/17/2010 06:45 AM EDT	01/09/2023 04:33 PM EST		1.37 MWh
Normal	San Antonio	TX	04/07/2011 07:35 AM CDT	01/09/2023 09:55 PM CST		1.69 MWh
Normal	Emerson	NJ	05/17/2011 07:50 AM EDT	01/10/2023 02:55 AM EST	0 Wh	2.29 MWh
Production Issue	Thousand Oaks	CA	07/14/2011 06:05 AM PDT	01/09/2023 09:35 PM PST		2.27 MWh
Normal	Scotch Plains	NJ	07/21/2011 08:36 PM EDT	01/10/2023 02:54 AM EST	12.78 kWh	1.84 MWh
Normal	San Ramon	CA	08/01/2011 06:15 AM PDT	01/09/2023 05:21 PM PST		1.37 MWh
Gateway Not Reporting	Newark	CA	08/08/2011 06:25 AM PDT	06/07/2022 09:53 PM PDT		49.64 MWh
Gateway Not Reporting	Oakley	CA	08/11/2011 06:20 AM PDT	07/17/2020 12:19 PM PDT		40.74 MWh
Microinverters Not Reporting	Hamilton	ON	07/23/2011 09:04 AM EDT	01/09/2023 05:00 PM EST	15 kWh	2.59 MWh
Normal	Los Altos	CA	08/19/2011 08:07 PM PDT	01/09/2023 05:20 PM PST	4.59 kWh	1.78 MWh
Microinverters Not Reporting	Castro Valley	CA	08/20/2011 07:55 PM PDT			15.22 MWh
Microinverters Not Reporting	Pleasanton	CA	08/30/2011 07:51 PM PDT			49.66 MWh
Normal	Redlands	CA	09/02/2011 06:20 AM PDT	01/09/2023 09:06 PM PST	2.93 kWh	1.82 MWh
Microinverters Not Reporting	Manteca	CA	08/25/2011 07:56 PM PDT	01/09/2023 05:20 PM PST	729 Wh	852.88 kWh
Microinverters Not Reporting	Merced	CA	09/29/2011 06:59 PM PDT			38.21 MWh
Normal	HIGHLAND	CA	10/24/2011 07:00 AM PDT	01/09/2023 11:55 PM PST		2.44 MWh
Microinverters Not Reporting	Fresno	CA	10/27/2011 06:19 PM PDT			114.06 MWh

search columns

Toggle All

System Type

System Size

Installed On

Last Report

Data Source

Production Meter

Consumption Meter

Current Power

Feedback

Revision history

Revision	Date	Description
USG-00016-1.0	July 2023	Initial release
Previous releases		