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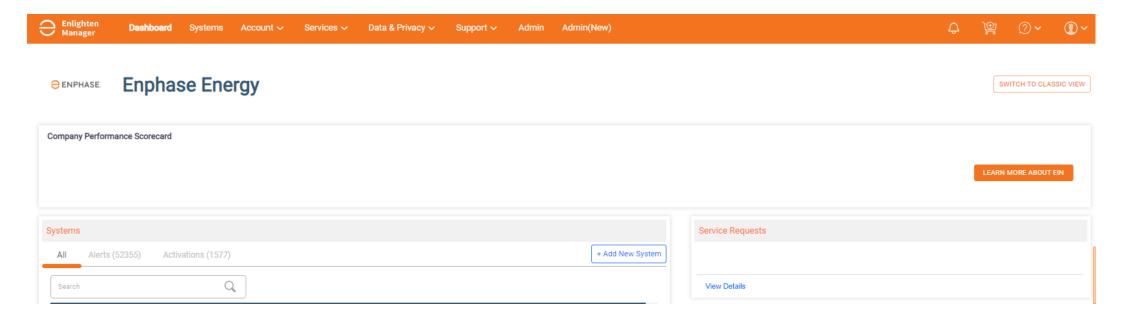


Introduction

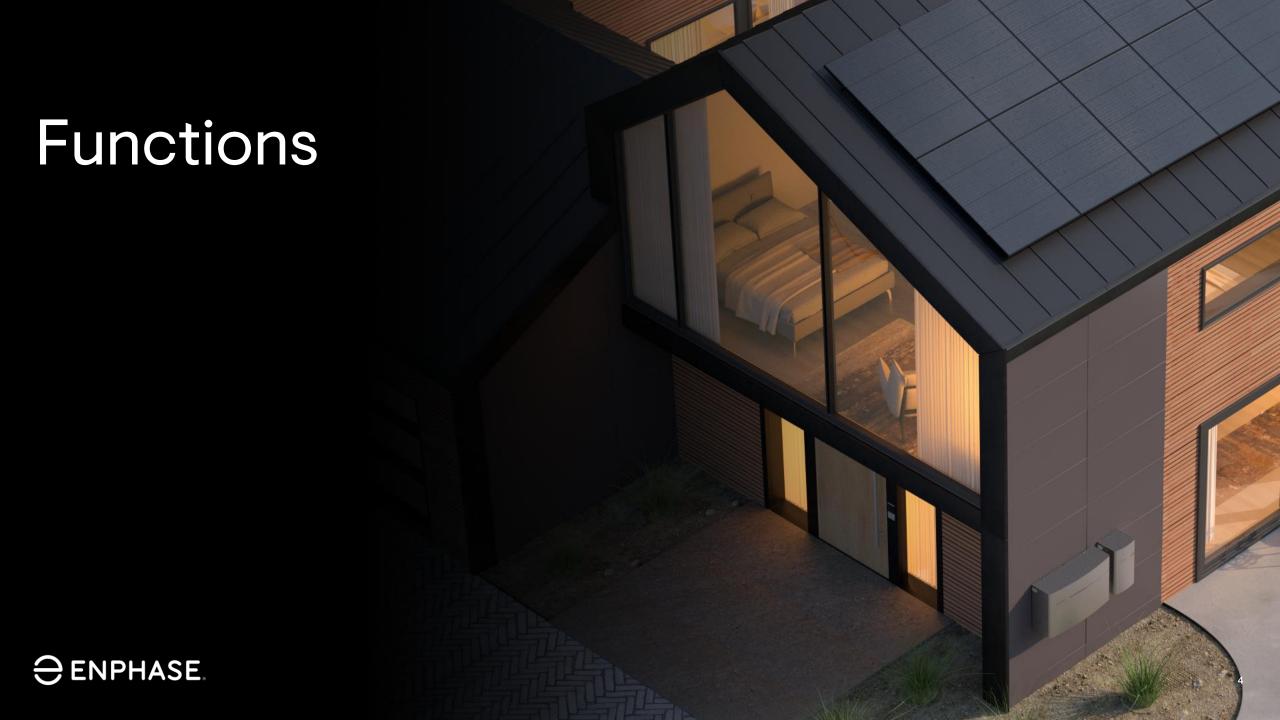
The Enphase Installer Portal provides mobile tools for installers to monitor and manage multiple systems from any online device.

The Enphase Installer Portal combines all information installers need to design, install, and manage Enphase Energy Systems.

Access the Enphase Installer Portal







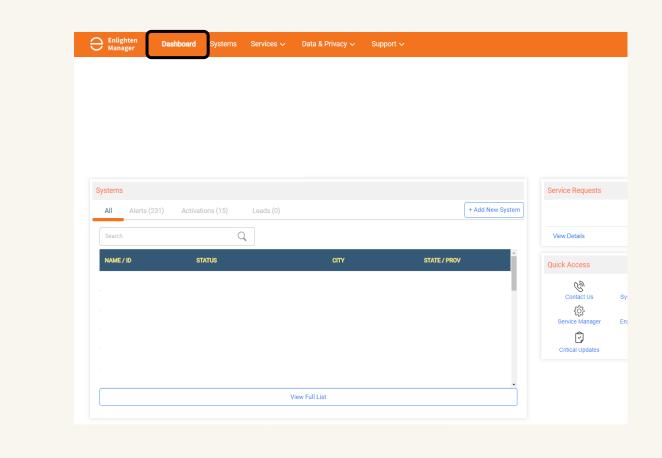
Learning objectives

- Understand the five primary Enphase Installer Portal tabs and the features they contain.
 - Alerts
 - Activations
 - Systems
 - Services
 - Support



The Enphase Installer Portal displays an overview of the installer's customer sites.

The main landing page is called the **Dashboard**.

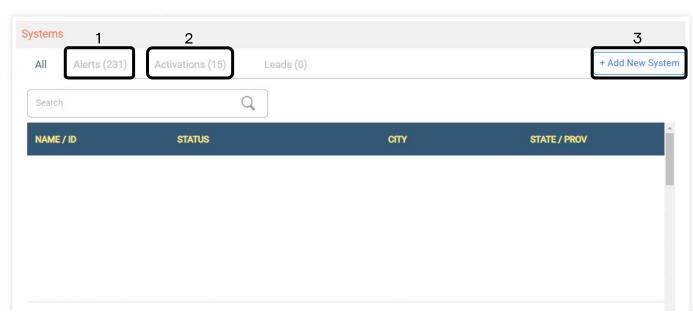


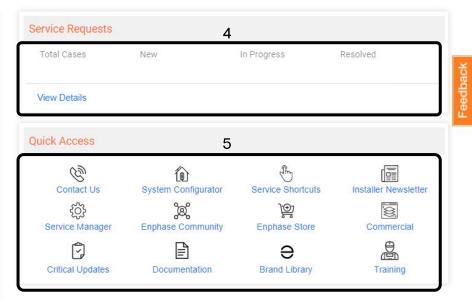


Functions

From the Dashboard, installers can view different site functions.

The screenshot below shows available functions:



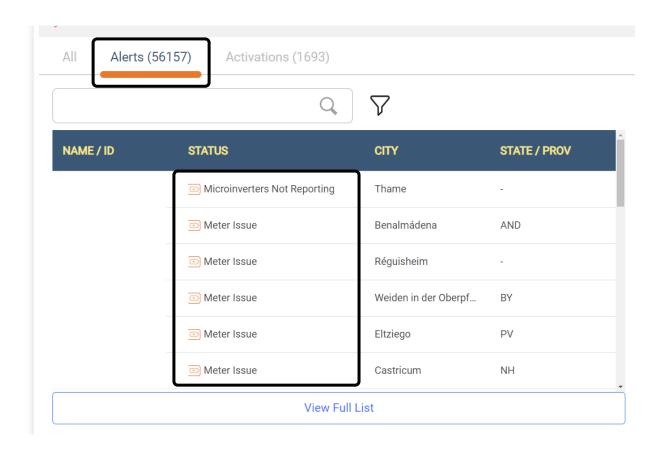


- 1. View Alerts
- 2. View Activations
- 3. Add New System to site
- 4. View Service Requests
- 5. Select Quick Access hyperlinks



Enphase Installer Portal: Alerts

Alerts indicates which sites are currently affected and the type of alert impacting the site.

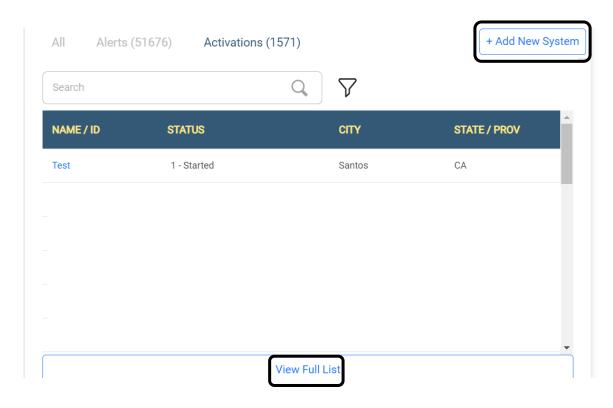




The **Activations** tab allows installers to choose which stage of activation to view, as well as what steps are needed to complete commissioning.







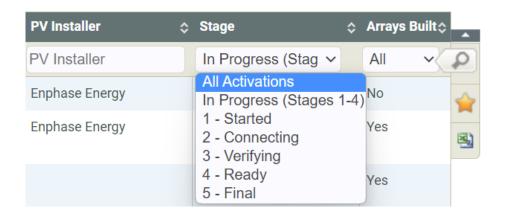
To add a new system, select **Add New System**.

To view the full list of activations, select **View Full List**, where an installer can view or amend an existing activation. The **Activations** page will open.



In the Activations page, select from the list of activations or use the search tools to view more details.

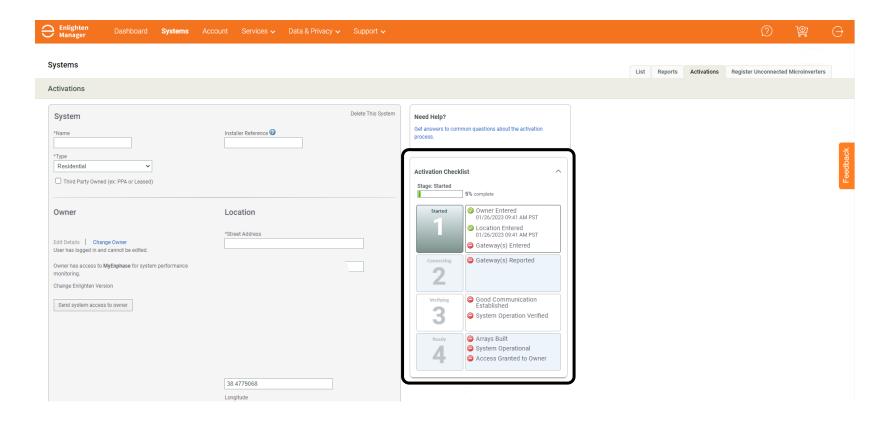
Use the **Stage** drop-down menu to help filter the search.



Once a site is selected, a new page will appear.



The selected site's time, date, and last update will be displayed in the **Activation Checklist**.





Installers can enter a site's production estimates in the **Activations** tab.

Array-level pr	oduction estimates (enter on the s	vetem settings nage)
	production estimate	vstem settings page)
Month	AC Energy (kWh)	
January		
February		
March		
April		
May		
June		
July		
August		
September		
October		
November		
December		

Step 1

Scroll down to the **Production Estimate** section and select **System-level production estimate**.

Step 2

Type the kWh estimates for each month to set the production estimates.



Enphase Installer Portal: Systems

The **Systems** tab allows the installer to view all systems.

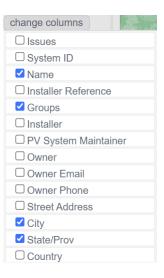


The change columns tab includes many options to assist in viewing system location, status, and production output.

A drop-down menu allows the installer to display or hide information by selecting or deselecting the checkboxes.

This feature greatly improves the fleet view for the installer, which is accessible by selecting the site name.

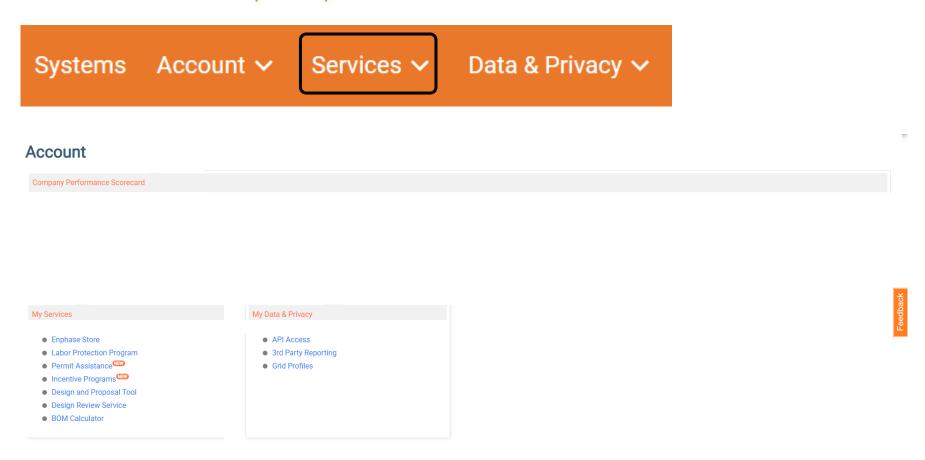






Enphase Installer Portal: Services

The **Services** tab allows admin installers to access company performance, service, and data and privacy tools.





Enphase Installer Portal: Support

The **Support** tab provides access to the Enphase Community page, which addresses FAQs and installer question submissions.



The Enphase Community page also provides new product updates and information.



Learning check

- Explain the features within each of the five primary Enphase Installer Portal tabs.
 - Alerts
 - Activations
 - Systems
 - Services
 - Support





Learning objectives

- Understand the information available in each Site view.
 - Array panel
 - Graph
 - Reports
 - Devices
 - Events
 - Live Status
 - Services
 - Kiosk view
- Understand the settings options.
 - <u>Labor Reimbursement</u>
 - Installer Reference
 - Production Estimate & Threshold
 - Array Details
- Understand the Self Service options.
 - Request Return
 - <u>Install Replacement</u>
 - Gateway Replacement



Enphase Installer Portal: View

From the **Systems** page, select the **View** tab to view a site's current energy information.

The Array panel will appear, displaying an overhead rendering of the site.

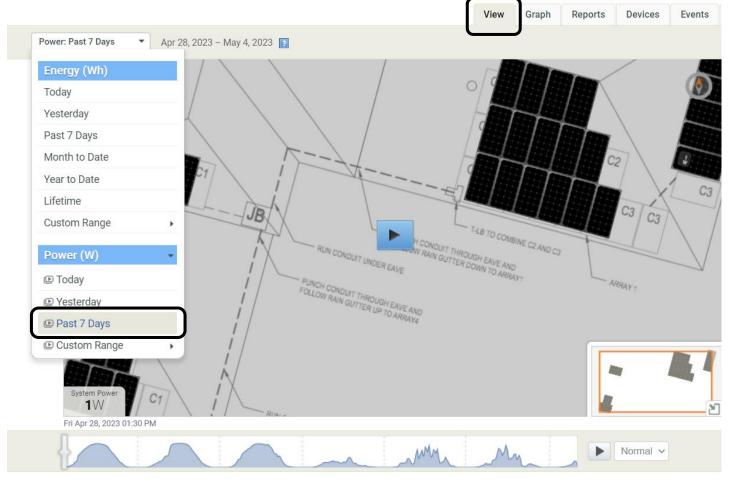


The side taskbar displays the key site information such as:

- Microinverter count
- IQ Battery count
- IQ Gateway count
- IQ Gateway connection type
- Site location
- Weather
- System status
- Energy produced

Enphase Installer Portal: Array panel

The array panel will display in the **View** tab, where installers can select the drop-down menu for Energy and Power.



These options display a 7-day playback or custom ranges in the Array panel.

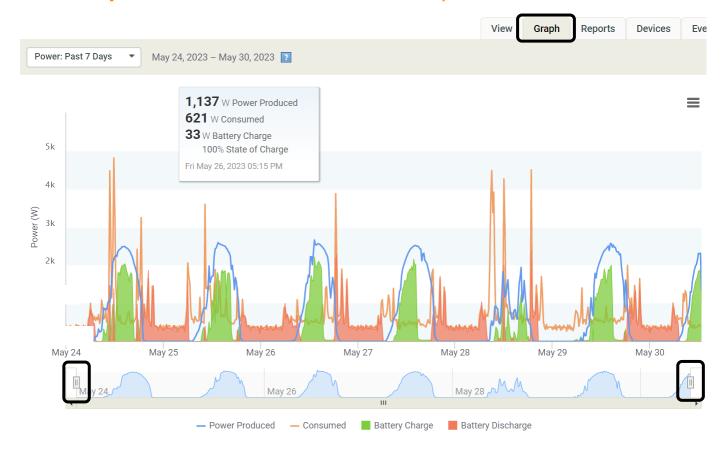
This feature helps identify specific events, shade, or production/reporting flags.

Installers can also select and isolate individual microinverters to gain function details from this view.



Enphase Installer Portal: Graph

The **Graph** tab allows installers to view production in detail.



Installers can select the sliders (indicated above) to sample a specific day in a close-up view.

Hovering the mouse over the graph lines will indicate to installers the production details specific to the exact time.



Enphase Installer Portal: Reports

The **Reports** tab allows installers to select specified report details, verify system production continuity, and view consumption trends.

There are options to download, save, or email reports in the drop-down menu.



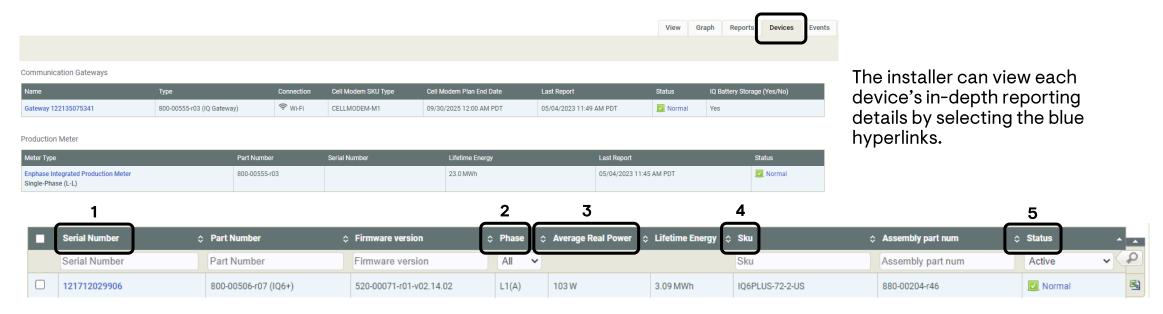
Top downloaded reports:

- Site Energy Production
- Site Energy Consumption
- Power Meter Output
- Monthly Energy Production
 Report



Enphase Installer Portal: Devices

The **Devices** tab allows installers to view active devices and their current status.



The installer can also view the following microinverter details:

- 1. Serial Number
- 2. Phase
- 3. Average Real Power
- 4. SKU
- 5. Status



Enphase Installer Portal: Devices

The **Devices** tab also features the **Add and/or Provision Microinverter** section.

	800-00506- r07 (IQ6+)	520-00071-r01- v02.14.02	L1(A)	106 W
	800-00506- r07 (IQ6+)	520-00071-r01- v02.14.02	L1(A)	104 W
	800-00506- r07 (IQ6+)	520-00071-r01- v02.14.02	L1(A)	103 W





The serial number is the only information the installer should input.



Enphase Installer Portal: Events

The **Events** tab provides details about events and their circumstances.



Event details and circumstances

1. Status: Type of event (production-related, reporting-related, etc.)

2. Impact: Importance of alert

3. Device: Which device is impacted

4. Event Name: Type of event (ACVOOR, ACFOOR, etc.)

5. Started: Timestamp of flagged event



Enphase Installer Portal: Live Status

Live Status allows the installer to verify real-time production of a system with IQ Gateway software versions 7.0.104 and above.



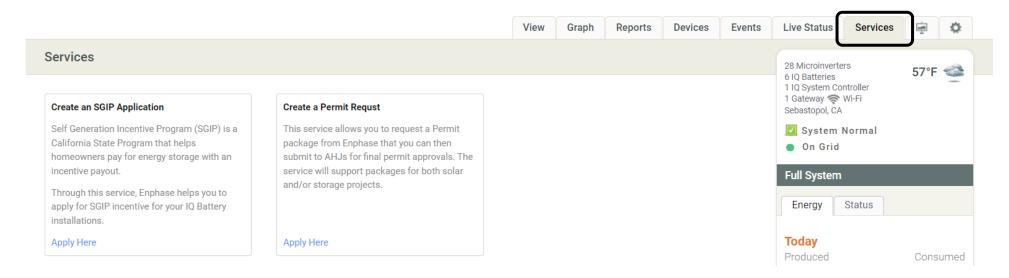
If Consumption CTs are installed, installers can see export details in real time.

If the system has batteries, installers can monitor charge and discharge in real time.



Enphase Installer Portal: Services

The Services tab details the Self Service options an installer can access.

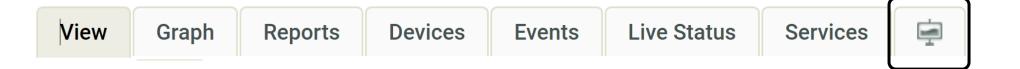


Installers can create SGIP Applications and create Permit Requests.



Enphase Installer Portal: Kiosk view

The **Kiosk view** is accessed by selecting the icon shown below, on the right of the screen.



Once selected, a new screen will display system details under four sub-tabs:

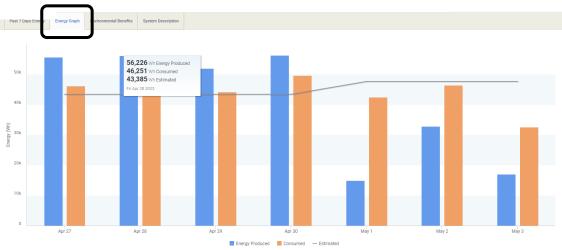
- Past 7 Days Energy
- Energy Graph
- Environmental Benefits
- System Description



Enphase Installer Portal: Kiosk view



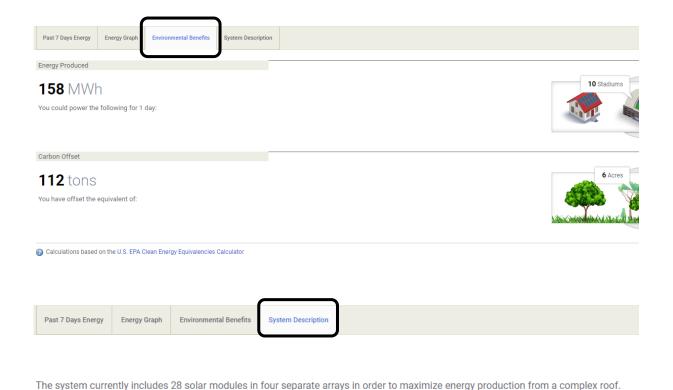
The **Past 7 Days Energy** tab provides a seven-day energy view.



The **Energy Graph** tab displays a graph indicating daily production totals in kWh.



Enphase Installer Portal: Kiosk view



The **Environmental Benefits** tab provides a breakdown of energy output capability and ecological impact.

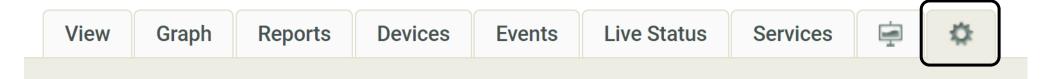
The **System Description** tab contains a few basic details about the system.



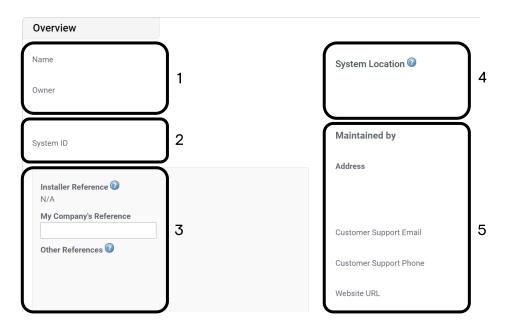
In 2020, the system was upgraded with Ensemble backup.

Enphase Installer Portal: Settings

Select the **Settings** gear icon to locate most of the Self Service options.



The **Settings** tab provides basic site information relating to the owner, the installer, and system location.



- 1. System owner information
- 2. System ID
- 3. Installer Reference
- 4. System Location
- 5. Installer contact information



Settings: Labor Reimbursement

The **Settings** page also provides a Self Service option to apply for labor reimbursement or an extended warranty period.

Labor Reimbursement

Enphase Energy provides a discretionary reimbursement, payable to solar-installers having to perform onsite labor for the purposes of a product warranty RMA. This labor reimbursement is separate from the written, product warranty itself. Eligibility for the reimbursement is dependent on the date the unit was activated and the specific product(s) installed.

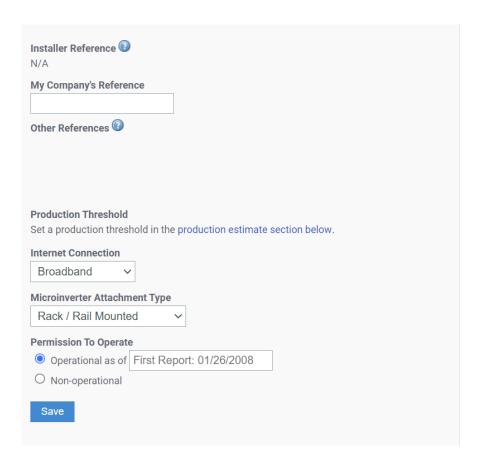
In order to qualify:

- Must be an reimbursement eligible product as determined by Enphase.
- Defective microinverter must have previously been detected and monitored by Enlighten monitoring software.
- The unit installation date must be within two years of the claim date.
- The defective microinverter must be returned to Enphase Energy if instructed to do so per the RMA approval.
- · No claims older than 3 months will be approved.



Settings: Installer Reference

The **Installer Reference** section allows the installer to input **My Company's Reference** for ease of access.

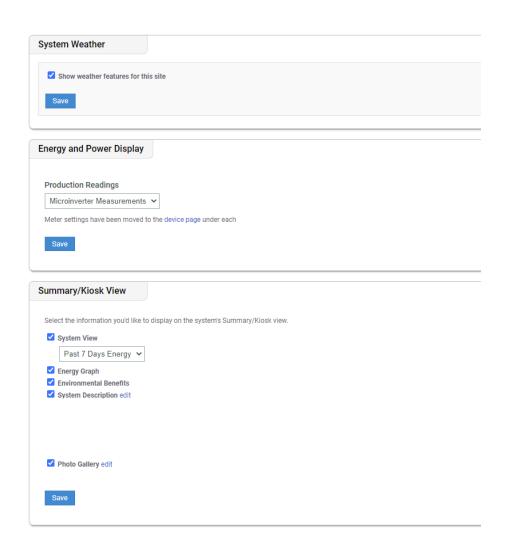


Installer Reference features:

- Set and view Production Threshold estimates
- Change and view Internet Connection type
- Change and view Microinverter Attachment Type
- Change and view Permission To Operate status



Settings: More features



System Weather

Displays weather for system location, allowing installers to identify environmental production inhibitors.

Energy and Power Display

Shows whether production is being measured via microinverter or via Production CT.

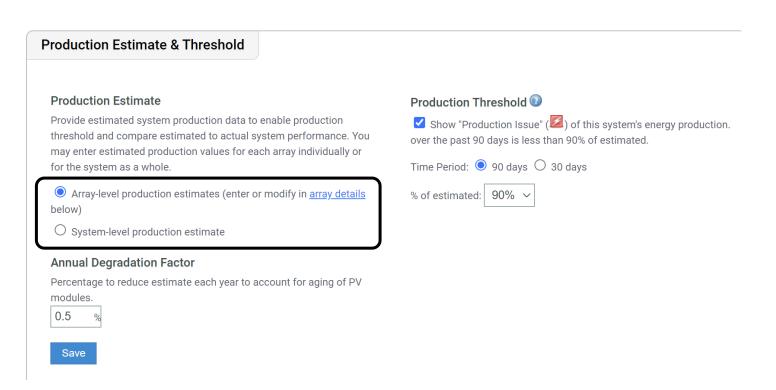
Summary/Kiosk View

Allows installers to edit details shown in Enphase Installer Portal tabs.



Settings: Production Estimate & Threshold

Production Estimate & Threshold allows installers to set a a Production Estimate, a percentage-based Annual Degradation Factor, and a Production Threshold.



Array-level estimates are based on percentages over time.

System-level estimates allow the installer to set monthly benchmarks for expected production.

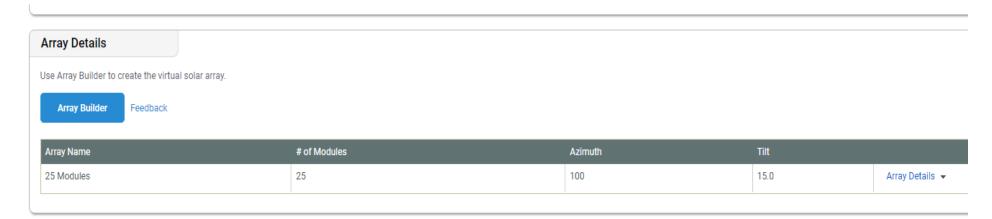
Enphase recommends recording production for at least one month before setting estimates.

If monthly benchmarks are not met, a production issue alert will display in all platforms.



Settings: Array Details

The Array Details section of the Settings tab links the installer to the Array Builder.



This is where the array map can be built, adjusted, or updated with future equipment installation.

Enphase representatives CANNOT build, adjust, or update array maps for their clients. This is a critical Self Service feature for installers.



Self Service options

The **Self Service** section allows installers to request returns, replace equipment, or replace an IQ Gateway.

Self Service Submit a microinverter or AC battery or IQ System Controller or IQ Battery or IQ Battery PCU warranty return request. Request Return Install a replacement microinverter or AC Battery. **Install Replacement** Replace Gateway

Select <u>Request Return</u> to submit a request for replacement equipment.

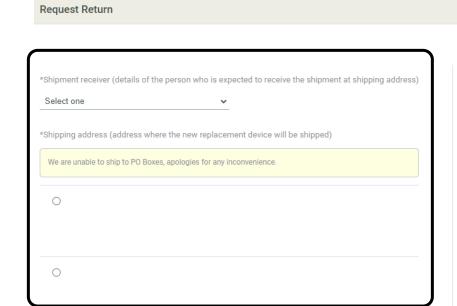
Select <u>Install Replacement</u> to retire defective equipment, provision new equipment, and update the array map.

Select <u>Replace Gateway</u> to automatically retire an old IQ Gateway and Provision the new IQ Gateway, including transferring /provisioning microinverters to the new IQ Gateway.



Self Service options: Request Return

To use the **Request Return** option, refer to the following instructions.





Step 1

Select the shipping address from the list provided.

Step 2

Select the device type, enter the device's serial number, and select the device.

Select **Submit**. An Enphase team member will process the request and follow up.



Self Service options: Install Replacement

To use the **Install Replacement** option, refer to the following instructions.





Self Service options: Gateway Replacement

To use the Gateway Replacement option, refer to the following instructions.



Step 1

Confirm that the new IQ Gateway is online and connected.

Step 2

Select the old IQ Gateway from the drop-down.

Step 3

Enter the new IQ Gateway serial number.

Select Replace Gateway.



- Explain the information available in each site view.
 - Array panel
 - Graph
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 - Kiosk view
- Explain the Settings options available.
 - Labor Reimbursement
 - Installer Reference
 - Production Estimate & Threshold
 - Array Details
- Explain the Self Service options.
 - Request Return
 - Install Replacement
 - Gateway Replacement





Learning objectives

- Understand how to resend Enphase access to customers.
- Understand how to update homeowner information.
- Understand how to update a grid profile.
- Understand how to disable user accounts.
- Understand how to enable and disable power production.
- Understand how to provide system access to subcontractors.





Resend Enphase access to customers

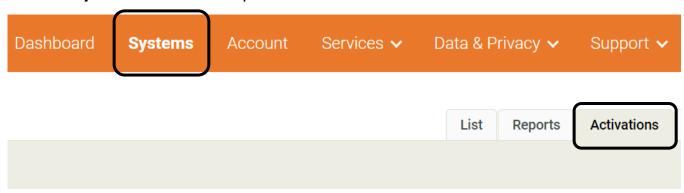
If a customer loses access to the Enphase App, an installer can resend access to the customer's email.

Step 1

Log in to the Enphase Installer Portal.

Step 2

Select **Systems** from the top left of the taskbar.



Step 3

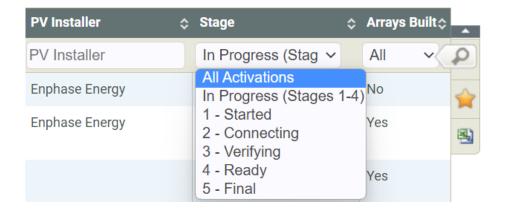
Select **Activations** from the top right tabs.

A drop-down menu will appear.



Resend Enphase access to customers

Step 4Select **All Activations** from the **Stage** drop-down menu.



A new page will appear.

Step 5

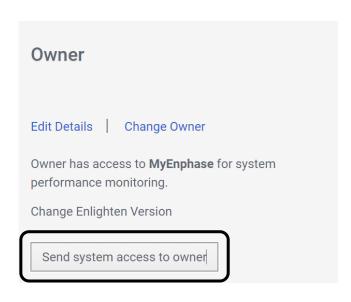
Select the system name. The activation form will appear.



Resend Enphase access to customers

Step 6

Under the Owner section, select Send system access to owner.



A new welcome email will be automatically sent to the email address listed on the activation form. This email will provide the customer with instructions to log in to the Enphase App.





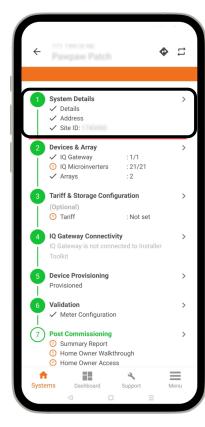
Update homeowner information

Installers can update a homeowner's personal information in the Installer App.

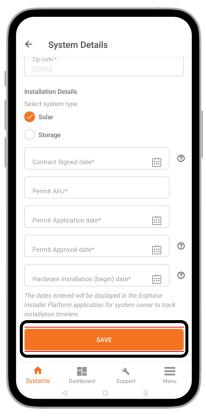


Step 1
In the Systems
tab, use the
search bar to
enter the Site
Name or Site ID.

Select the site from the list that appears.



Step 2
Select System
Details to view
registered
homeowner
information,
including contact
information, site
address, and
installation details.



Step 3
Enter the updated homeowner information in the provided fields, then select SAVE.

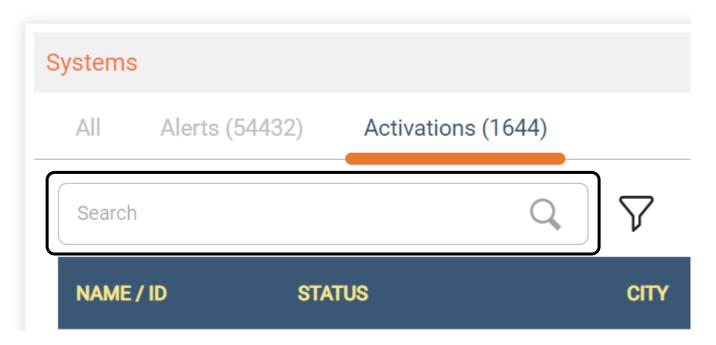
The homeowner will receive an automatic email containing the updated details.





Change grid profile

Installers can change a site's grid profile in the **Systems** tab.



Step 1

Select the Activations tab.

Step 2

Enter the Site ID, then select the correct site from the list that appears.



Change Grid Profile

Step 3

Scroll to the **Gateway** section and select the correct grid profile from the **Grid Profile** dropdown menu.



Step 4

Scroll to the bottom of the page and select Save.





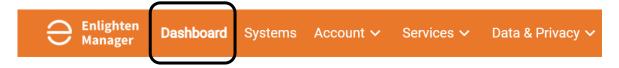


Disable user accounts

Only installers with admin access in their company's account can disable user accounts.

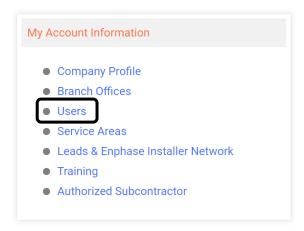
Step 1

Select Dashboard.



Step 2

Scroll to the **My Account Information** section and select **Users**.





Disable user accounts

Step 3

Select the user's name from the Users list.

Users



Step 4

Select the checked box next to **Active** to disable the user account.

User Profile



If the box is checked, the user account is active.

If the box is unchecked, the user account is disabled.

If you are unable to disable an account, please contact Enphase Support.





• Know the steps necessary to enable and disable power production.



Enable and disable power production

Using the one-button standby mode, an installer can remotely disable and enable power production using the Enphase Installer Portal.

For example, an installer may want to prevent the system from producing power prior to receiving permission to operate from the utility.

To disable power production using a mobile device while on the job site, see the application note.

To disable or enable power production using the Enphase Installer Portal for microinverters communicating with an IQ Gateway, refer to the following instructions.

Step 1

Select the **Devices** tab.

Step 2

Under the IQ Gateway Communication Gateways list, select the IQ Gateway.



Enable and disable power production

Step 3

Scroll down to **Tasks** to view the power production status.

Select Disable Power Production or Enable Power Production.

Tasks

Check Signal Strength

Check signal strength to measure the Gateway's communication with the microinverters — for example, if the Gateway has been moved or to determine the best location for the Gateway.

Device Scanning is inhibited. To re-enable device scanning, please contact Customer Support.

Disable Power Production

Power production is enabled on the microinverters communicating with this Gateway. More Info

The IQ Gateway will receive and execute the task within 30 minutes.

When enabling or disabling production using a cellular connection to the Enphase Cloud, it will take at least one hour.

If there are IQ Batteries communicating with the IQ Gateway, they will not charge or discharge while power production is disabled.



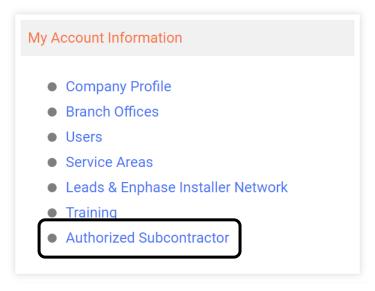
• Explain the steps necessary to enable and disable power production.





Provide system access to subcontractors

Installers can allow an authorized subcontractor access to a site system.



Step 1

Under the **My Account Information** dropdown, select **Authorized Subcontractor**.

+ ADD AUTHORIZED SUBCONTRACTOR

Step 2

Select **Add Authorized Subcontractor** to search for the subcontractor and grant access.



- Explain how to resend Enphase access to customers.
- Explain how to update homeowner information
- Explain how to update a grid profile
- Explain how to disable user accounts.
- Explain how to enable and disable power production.
- Explain how to provide system access to subcontractors.





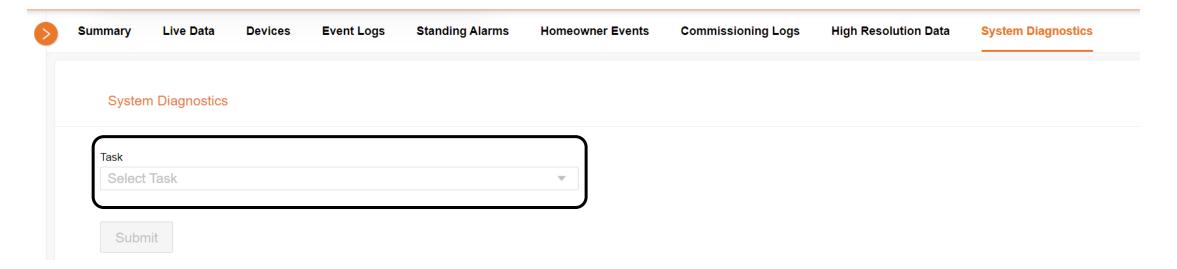
- Know the function of each System Diagnostics feature:
 - Provision device
 - Enable or Disable power production
 - Change Consumption Meter State
 - Reboot IQ Gateway remotely



System Diagnostics

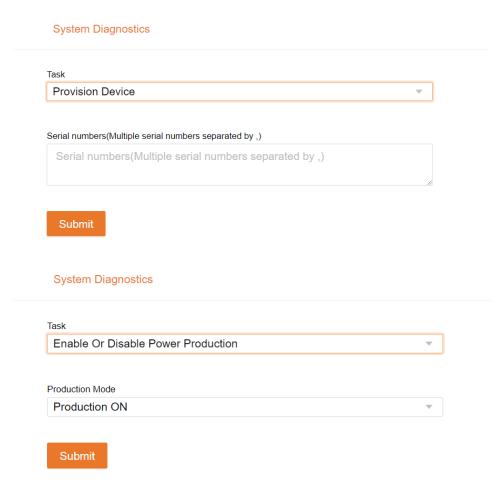
The **System Diagnostics** tool, shown below, provides more Self Service options for versions 7.0.93 and up.

Select the **Task** drop-down menu to view the additional options, then select **Submit**.





System Diagnostics



Provision Device

From the drop-down, select **Provision Device**.

Enter the device serial number, separating by a comma if there is more than one serial number.

Select Submit.

Enable or Disable Power Production

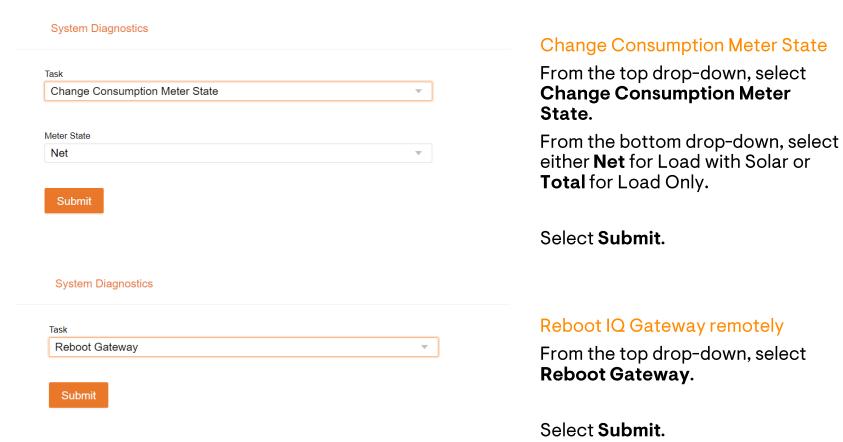
From the top drop-down, select **Enable Or Disable Power Production**.

From the bottom drop-down, select either **Production ON** or **Production OFF**.

Select Submit.



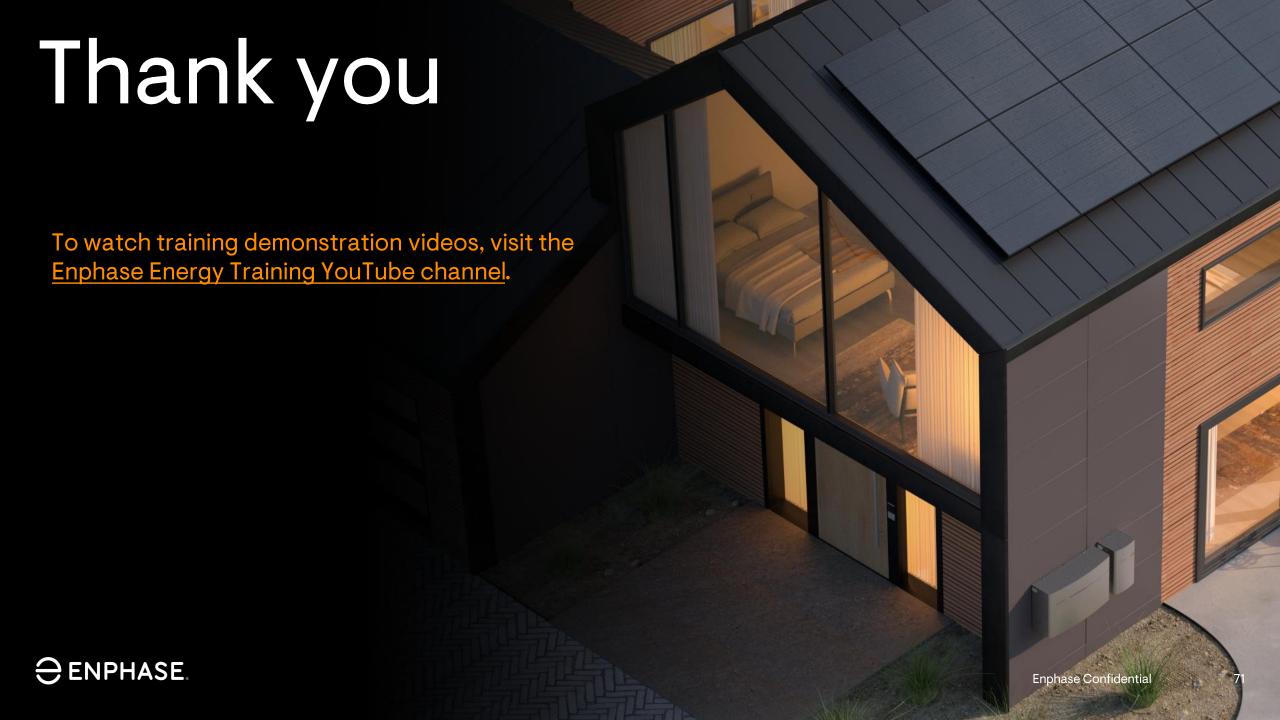
System Diagnostics





- Function of each System Diagnostics feature:
 - Provision device
 - Enable or Disable power production
 - Change Consumption Meter State
 - Reboot IQ Gateway remotely





REVISION	DATE	DESCRIPTION
ING-00005	June 2023	Initial Version



