

Activating the Enphase Energy System using the Activations page

Applicable regions: North America

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1. About this document

This user guide describes all the key features in the Activations page in the Enphase Installer Portal that opens up when the user tries to add a new system.

2. Background

The existing Activations page in the Enphase Installer Portal is a simple form that requests basic details from the user, such as system location, owner details, system type, and so on. Key commissioning activities such as serial number scanning, provisioning, load control configuration, system design compatibility checks, and necessary validations were limited to the Enphase Installer App.

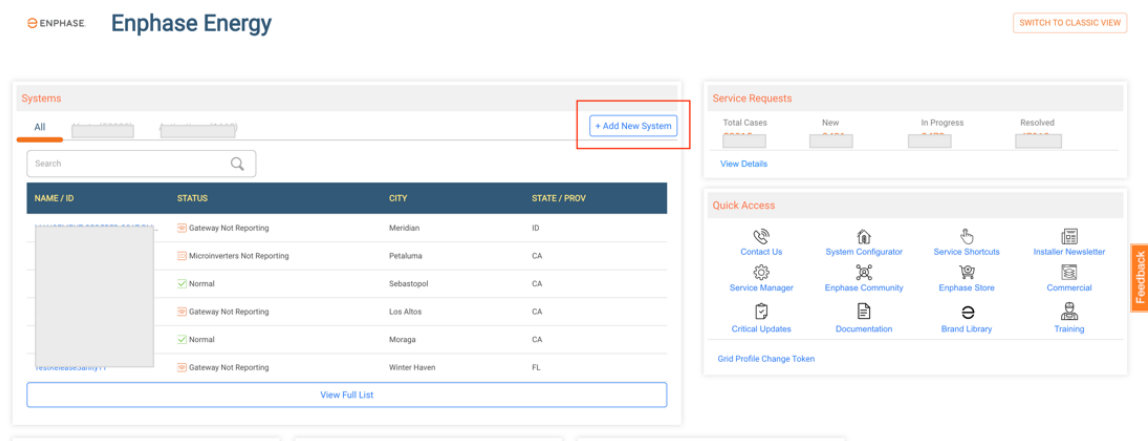
The new Activations page facilitates the installers to perform different commissioning tasks remotely from their office, thereby reducing the time spent in the field during commissioning activities.

3. Accessing the Activations page

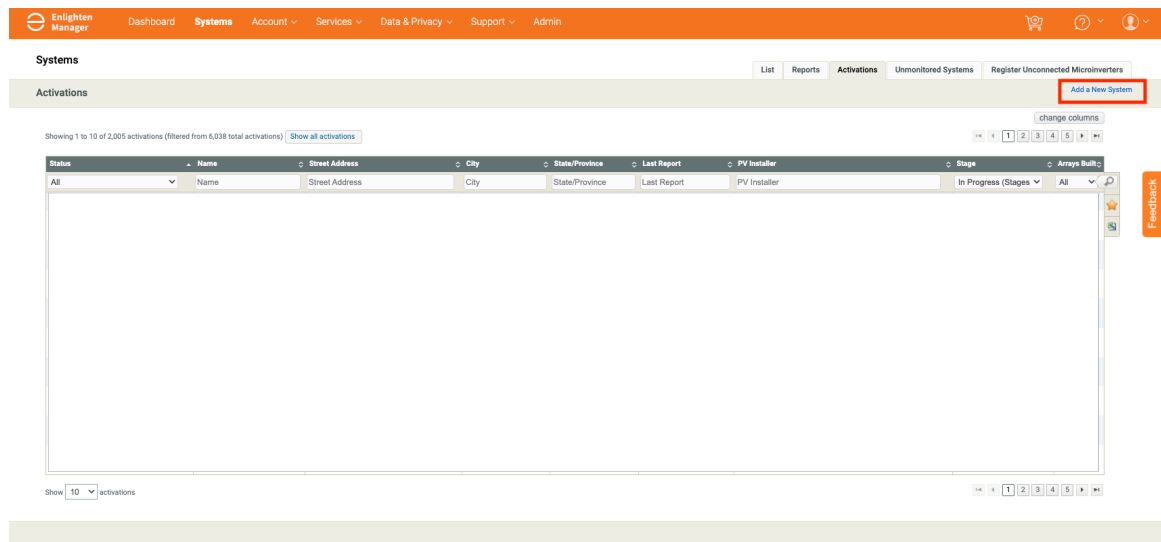
To access the Activations page, follow these steps:

1. Log in to the Enphase Installer Portal.
2. To create a new activation, on the **Dashboard** page, click **+Add New System**.

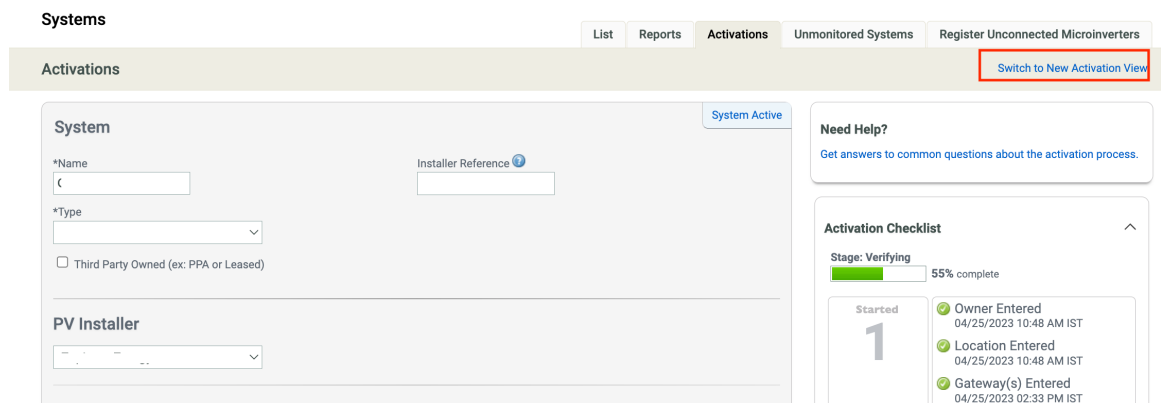
You can also open an existing activation from the list of systems displayed on the **Systems** dashboard.



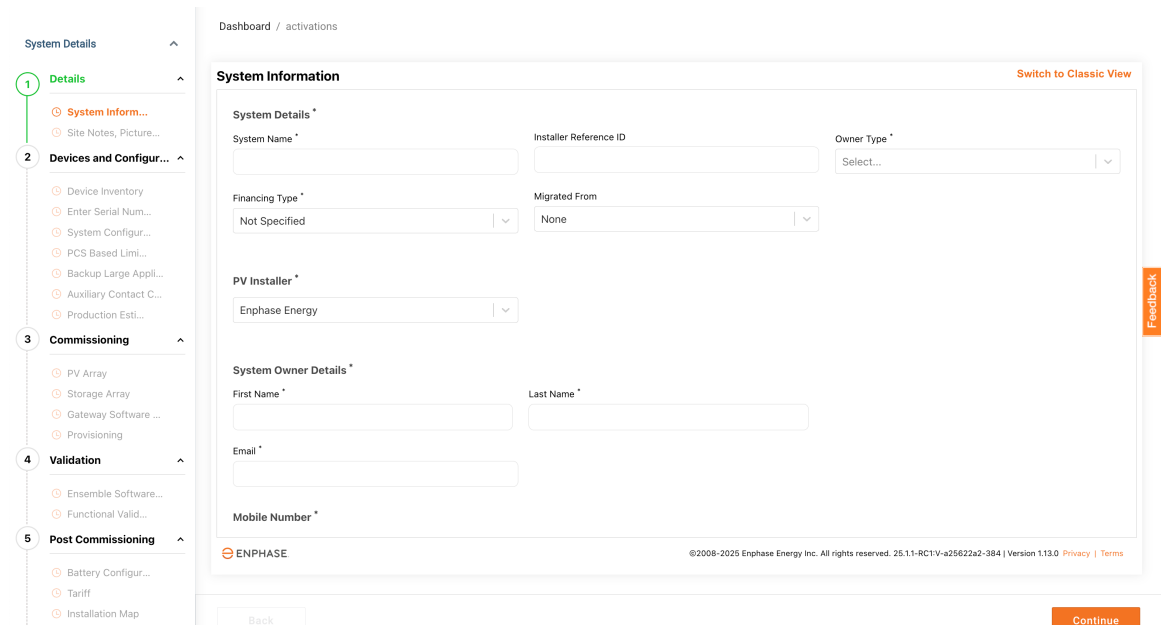
Alternatively, on the **Systems** page, you can navigate to the Activations list. To add a new system, click the **Add a New System** button at the top-right corner. You can also open an existing activation from the list of systems displayed.



If you see an old activation page, click **Switch to New Activation View**.



The Activations page is displayed.



4. Activating a system

To activate a system, you must perform the following steps on the Activations page:

- Details
- Devices and Configuration
- Commissioning
- Validation
- Post Commissioning

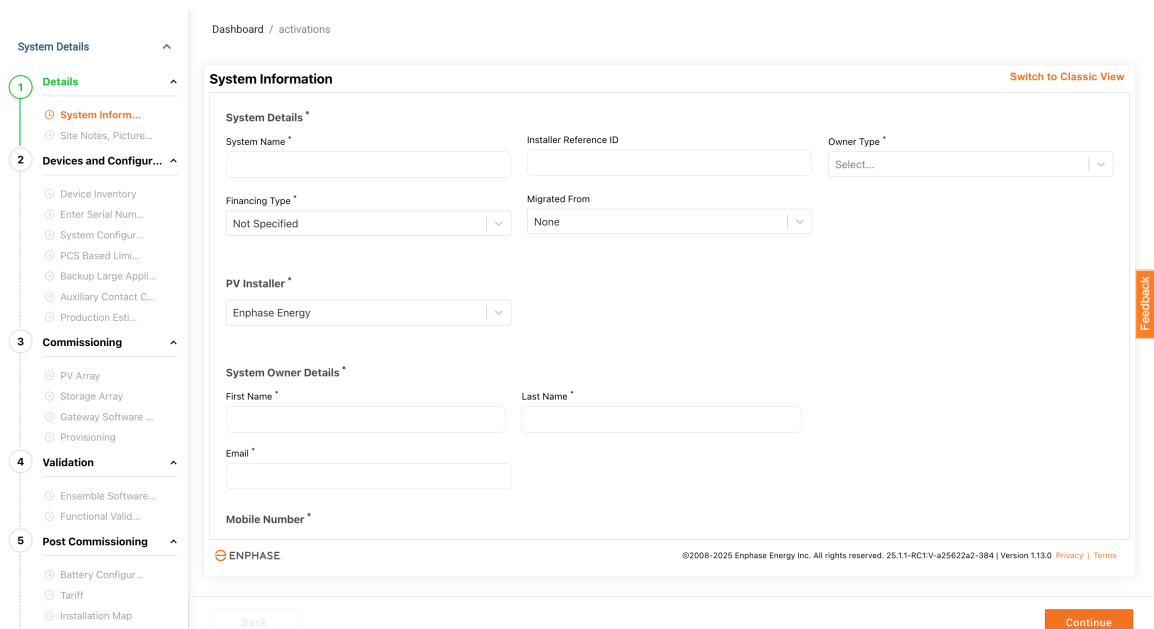
4.1 Details

In the "Details" section, the installer can enter the system details remotely from the installer's office. This section consists of the following subsections:

- System Information
- Site Notes, Pictures & Docs

4.1.1 System Information

1. Enter system details such as System Name, Owner Type (Residential or Commercial), Financing Type (cash, loan, or PPA/leased), PV Installer, System Owner, Site Location, and so on.



The screenshot shows the 'System Information' form in the Enphase dashboard. The form is titled 'System Information' and includes a 'Switch to Classic View' link. It contains several sections with required fields marked with an asterisk (*):

- System Details *:**
 - System Name *
 - Installer Reference ID
 - Owner Type * (Select...)
- Financing Type *:**
 - Financing Type * (Not Specified)
 - Migrated From (None)
- PV Installer *:**
 - PV Installer * (Enphase Energy)
- System Owner Details *:**
 - First Name *
 - Last Name *
 - Email *
 - Mobile Number *

The form also includes a 'Feedback' button on the right side and a 'Continue' button at the bottom right. The Enphase logo and copyright information are visible at the bottom of the form.

You can scroll down to enter the details.

System Information Switch to Classic View

Mobile Number *

Owner will receive MyEnlighten access for system performance monitoring.

Send system access to owner

Site Location *

Street Address 1 *

Street Address 2

City *

State *

Country *

United States

Zip code *

Map Satellite

Google

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Back Continue

Feedback

2. Enter the **Grid Interconnection Application Date** for NEM 3.0 systems in California to confirm site eligibility for NEM 3.0.

Dashboard / activations

System Information Switch to Classic View

Zip code *

760044

Grid Interconnection Application Date

Select date

Grid Connection Type *

Net Billing Tariff (NEM 3.0)

Net Metering (NEM 2.0)

Net Feed-in Tariff

Gross Feed-in Tariff

Storage Only

Solar + Storage

Do you have permission to operate (PTO)?

Yes No

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Back Continue

Feedback

3. Select the appropriate system type.

4. Select the PTO status in the Activations page when you commission an Enphase Energy System. You can also update it later if needed.

Permission to Operate (PTO) is the approval from the local utility company to connect a solar or battery system to the grid.

5. Enter the system size, the details of the PV modules being installed and the manufacturer of the third-party storage devices (if any).

1

Details

System Inform...

Site Notes, Picture...

2

Devices and Configur...

Device Inventory

Enter Serial Num...

System Configur...

PCS Based Limi...

Backup Large Appli...

Auxiliary Contact C...

Production Esti...

3

Commissioning

PV Array

Storage Array

Gateway Software ...

Provisioning

4

Validation

Ensemble Software...

Functional Valid...

5

Post Commissioning

Battery Configur...

Tariff

Installation Map

Summary Report

System Information

Switch to Classic View

Add another PV Module

Installation Details

Microinverter Attachment Type

Array Type

Enter array-level details on PV Array page

Is Third Party PV Present?

Do you have third party storage device?*

Yes

No

Manufacturer *

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Privacy

Terms

Back

Continue

Feedback

- Enter the permit and contract date details. If solar and storage permit dates differ, update the details accordingly.

1

Details

System Inform...

Site Notes, Picture...

2

Devices and Configur...

Device Inventory

Enter Serial Num...

System Configur...

PCS Based Limi...

Backup Large Appli...

Auxiliary Contact C...

Production Esti...

3

Commissioning

PV Array

Storage Array

Gateway Software ...

Provisioning

4

Validation

Ensemble Software...

Functional Valid...

5

Post Commissioning

Battery Configur...

Tariff

Installation Map

Summary Report

System Information

Switch to Classic View

Solar

Contract Signed Date*

Permit AHJ*

Hardware Installation (Begin) Date*

Select date

Permit AHJ

Select date

Permit Approval Date*

Select date

Storage

Contract Signed Date*

Permit AHJ*

Hardware Installation (Begin) Date*

Select date

Permit AHJ

Select date

Permit Approval Date*

Select date

Solar and Storage dates are different

The dates entered will be displayed in the Enlighten application for system owner to track installation timeline.

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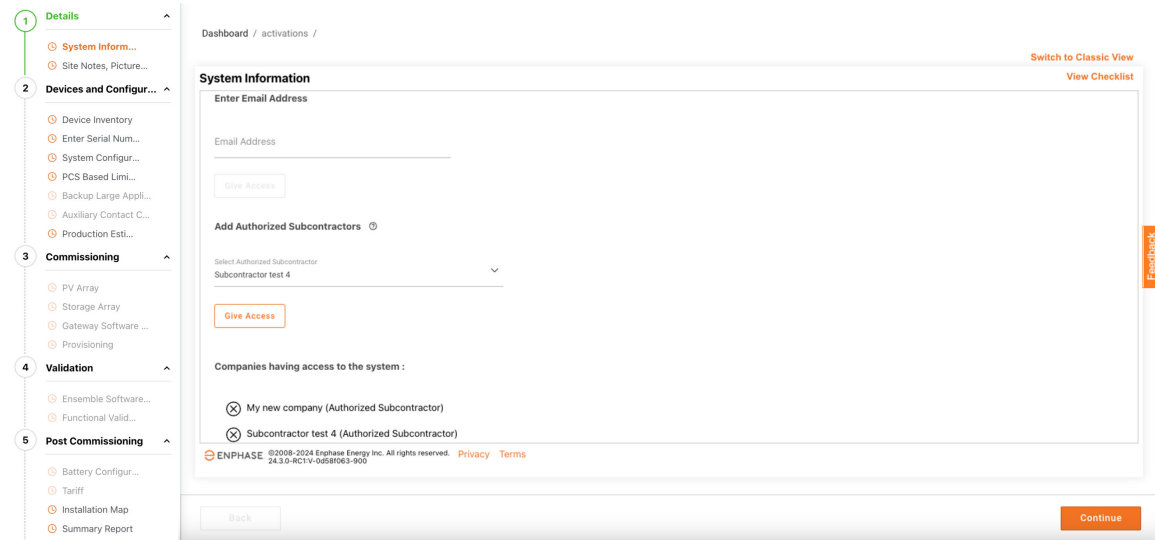
Terms

Back

Continue

Feedback

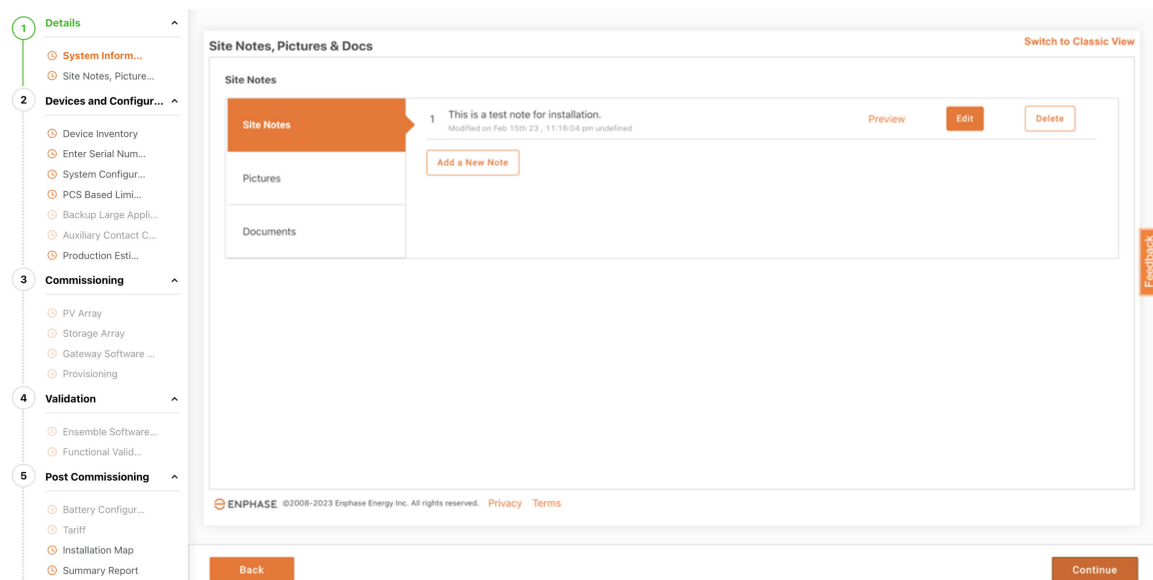
- In the "System Access" section, you can provide third-party system access to other companies and authorized subcontractors if the commissioning is outsourced to them.



The screenshot shows the 'System Information' form in the Enphase activation interface. The left sidebar contains a navigation menu with five main sections: 1. Details, 2. Devices and Configuration, 3. Commissioning, 4. Validation, and 5. Post Commissioning. The 'Details' section is currently active, showing sub-items like 'System Information', 'Site Notes, Pictures & Docs', 'Device Inventory', 'Enter Serial Number', 'System Configuration', 'PCS Based Limit', 'Backup Large Appliance', 'Auxiliary Contact Configuration', and 'Production Estimation'. The 'System Information' form itself has a 'Dashboard / activations /' breadcrumb at the top. It includes a 'Switch to Classic View' link and a 'View Checklist' link. The form has a 'Give Access' button, a 'Select Authorized Subcontractor' dropdown menu (currently showing 'Subcontractor test 4'), and a 'Give Access' button. Below this, there is a section for 'Companies having access to the system:' with two radio buttons: 'My new company (Authorized Subcontractor)' and 'Subcontractor test 4 (Authorized Subcontractor)'. At the bottom, there is a 'Back' button and a 'Continue' button. A 'Feedback' button is also visible on the right side of the form.

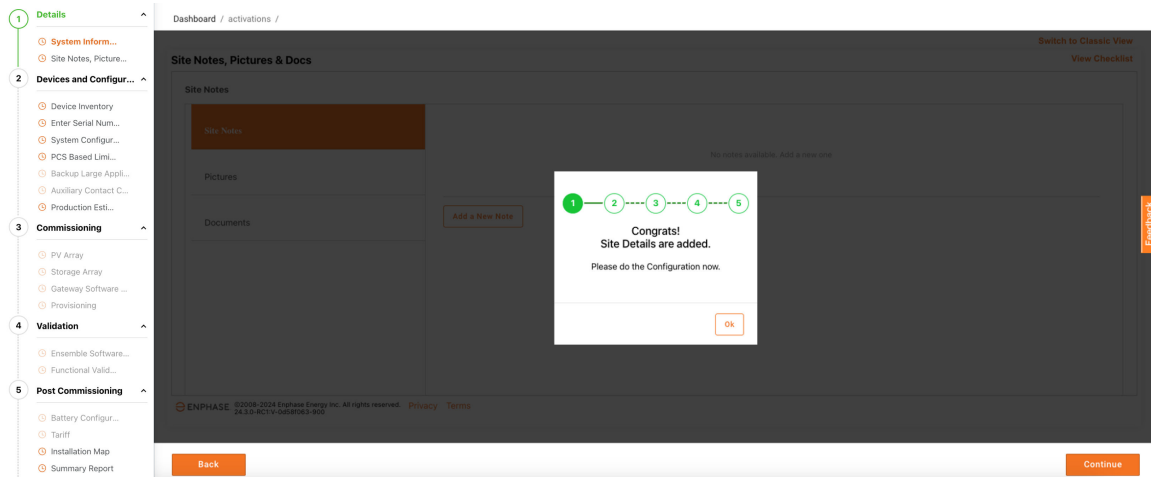
4.1.2 Site Notes, Pictures & Docs

In the "Sites Notes, Pictures & Docs" section, installers can add notes, pictures, or documents pertaining to the system installation, which they can refer to later.



The screenshot shows the 'Site Notes, Pictures & Docs' form in the Enphase activation interface. The left sidebar is the same as in the previous screenshot. The 'Site Notes, Pictures & Docs' section is currently active, showing sub-items like 'Site Notes', 'Pictures', and 'Documents'. The 'Site Notes' form has a 'Switch to Classic View' link. It includes a 'Preview' button, an 'Edit' button, and a 'Delete' button. There is a 'Add a New Note' button. The form shows a list of notes, with one note visible: '1 This is a test note for installation. Modified on Feb 15th 23, 11:16:04 pm undefined'. At the bottom, there is a 'Back' button and a 'Continue' button. A 'Feedback' button is also visible on the right side of the form.

After the "Details" section is filled out, you will see the following message.



4.2 Devices and Configuration

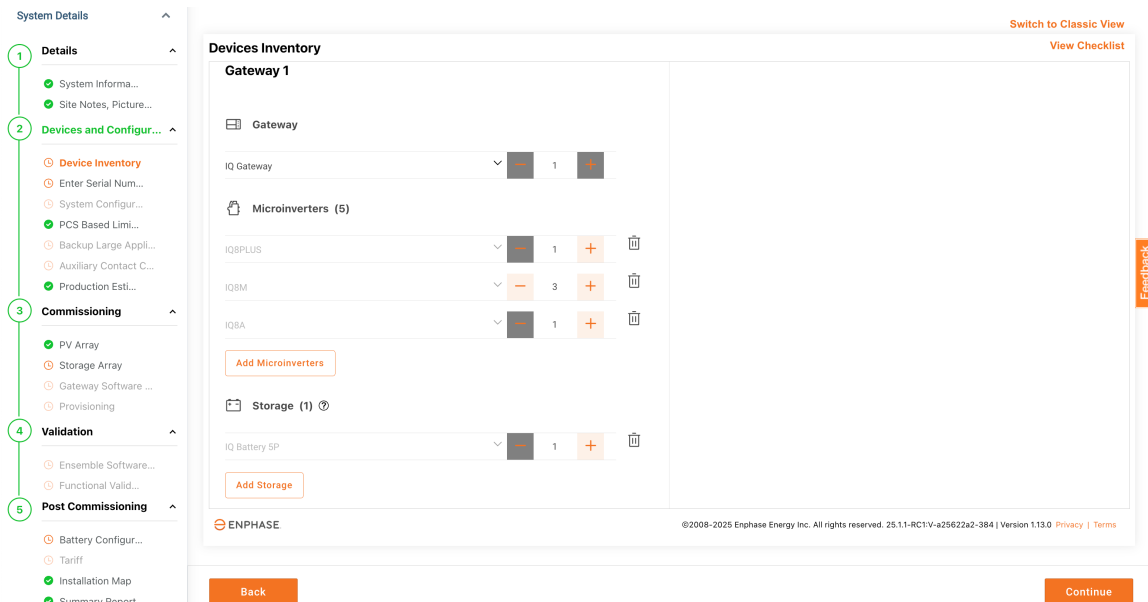
The "Devices and Configuration" section can be filled in by anyone at the installer's office, preferably an operations person, after signing the contract with the homeowner. This section consists of the following subsections:

- Device Inventory
- Enter Serial Numbers
- System Configuration
- Battery Mode
- Power Controlled System
- Auxiliary Contact Configuration
- Production Estimate

4.2.1 Device Inventory

In the "Device Inventory" section, you can fill in the details of the devices planned to be installed in the system. For example, if 10 microinverters are being installed in the system, the user must specify the type of microinverters that are being installed (IQ8, IQ7, and other types).

Here, validations are done in the background to ensure the installer does not proceed with device combinations not currently supported at Enphase. Additionally, wherever applicable, checks like the PV-ESS ratio (microinverter size to storage size) are performed, and if violated, recommendations for corrective actions are also provided.

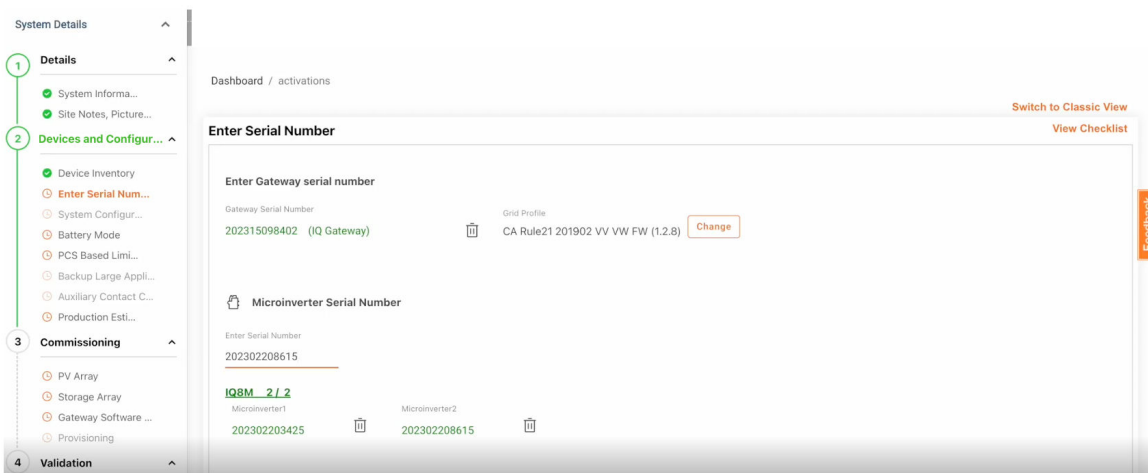


4.2.2 Enter Serial Number

In the "Enter Serial Number" section, you can enter the serial numbers of the devices entered in the "Device Inventory" section. Three validations are performed here:

- The serial number entered belongs to a valid Enphase device.
- The serial number entered corresponds to a device present in the Device Inventory section.
- The serial number entered exists in another system.

Additionally, you can update the grid profile.



4.2.3 System Configuration

In the "System Configuration" section, you can fill in details of the backup of the system, specify where the Consumption CTs are placed, and decide whether to make the system compliant with the NEC 120% rule.

System Details

1 Details

System Informat...

Site Notes, Picture...

2 Devices and Configur...

Device Inventory

Enter Serial Num...

System Configur...

PCS Based Limi...

Backup Large Appli...

Auxiliary Contact C...

Production Esti...

3 Commissioning

PV Array

Storage Array

Gateway Software ...

Provisioning

4 Validation

5 Post Commissioning

Services

System Reporting

Switch to Classic View

View Checklist

Feedback

System Configuration

Select Backup Type

Whole Home Backup

Partial Home Backup

Where are the Consumption CTs placed?

Between the utility service and the Main Breaker

Between the IQ System Controller and the Main Panel

Do you want to limit the current to make the system comply with NEC 120% rule?

Yes

No

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Back

Continue

4.2.4 Battery Mode (if applicable)

This mode is applicable for NEM 3.0 geographies such as California. It allows you to set the battery in Import only or Export only mode. You can change the battery mode any time up to seven days from the day you first set the mode.

System Details

1 Details

System Informa...

Site Notes, Picture...

2 Devices and Configur...

Device Inventory

Enter Serial Num...

System Configur...

PCS Based Limi...

Backup Large Appli...

Auxiliary Contact C...

Production Esti...

3 Commissioning

PV Array

Storage Array

Gateway Software ...

Provisioning

4 Validation

5 Post Commissioning

Services

System Reporting

Switch to Classic View

View Checklist

Feedback

Battery Mode

Select the Battery Mode

The battery mode should be same as operating mode for the storage device as per the grid interconnection application.

Export Only

Import Only

Battery can export to the grid. Charge from grid is not allowed

Battery can charge from the grid. Export to the grid is not allowed

Done

Note: Please contact the system owner/utility provider to know battery operating mode in the grid interconnection application.

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Back

Continue

4.2.5 Power Control System Based Limiting

In the "Power Control System Based Limiting" section, the following configurations are available:

- Main Panel Upgrade Avoidance (applicable for U.S., Puerto Rico, Bermuda, and Mexico)
 - Busbar Overload Control (Busbar PCS)
 - Current Limit with NEC 120% Rule
 - Current Limit Directly Entered
- IQ Battery Oversubscription (applicable for U.S., Puerto Rico, Bermuda, and Mexico)
- Aggregated Power Export Limit (applicable for U.S., Puerto Rico, Bermuda, Mexico, and UK)

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January 2025
 USG-00015-2.0-EN

- PIM Configuration

The following figure shows the **Busbar Overload Control (Busbar PCS)** configuration.

The screenshot displays the 'PCS Based Limiting' configuration page. On the left, a sidebar shows the navigation menu with steps 1 through 5. Step 2, 'Devices and Configur...', is active, and 'PCS Based Limi...' is selected. The main content area is titled 'PCS Based Limiting' and includes a 'Switch to Classic View' link and a 'View Checklist' link. The configuration is divided into two main sections: 'Main Panel Upgrade Avoidance' (Set current limit for Main Panel) and 'Choose an option to use PCS Controlled Current Export Limiting for Solar.' The 'Busbar Overload Control' option is selected, indicating that current exported from solar will be limited based on DER breaker size. Below this, there are input fields for 'Main Load Panel Busbar Rating (A)' (set to 100), 'Main Service Breaker Rating (A)' (set to 80), 'DER/ Backfeed Breaker size (A)' (set to 40), and a note that the maximum DER busbar breaker size allowed is 80. There are also fields for 'No. of PV Breakers', 'PV Breaker Size (A)', 'No. of batteries on Storage breaker slot 1', and 'Breaker Size of Storage slot 1 (A)'. At the bottom, there are 'Back' and 'Continue' buttons, and a footer with the Enphase logo and copyright information.

The following figure shows the **Current Limit with NEC 120% Rule** configuration.

The screenshot displays the 'PCS Based Limiting' configuration page, similar to the previous one, but with the 'Current Limit with NEC 120% Rule' option selected. This option indicates that current exported from solar will be limited to 120% of the main panel busbar breaker - main service breaker. The input fields for 'Main Load Panel Busbar Rating (A)' (set to 100) and 'Main Service Breaker Rating (A)' (set to 80) are visible. There are also fields for 'No. of PV Breakers', 'PV Breaker Size (A)', 'No. of batteries on Storage breaker slot 1', and 'Breaker Size of Storage slot 1 (A)'. A 'Validate the settings' button is present below the input fields. At the bottom, there are 'Back' and 'Continue' buttons, and a footer with the Enphase logo and copyright information.

The following figure shows the **Aggregated Power Export Limit** configuration.

For more information about PCS-based limiting, see the [Power Control System integration in Enphase Energy System tech brief](#).

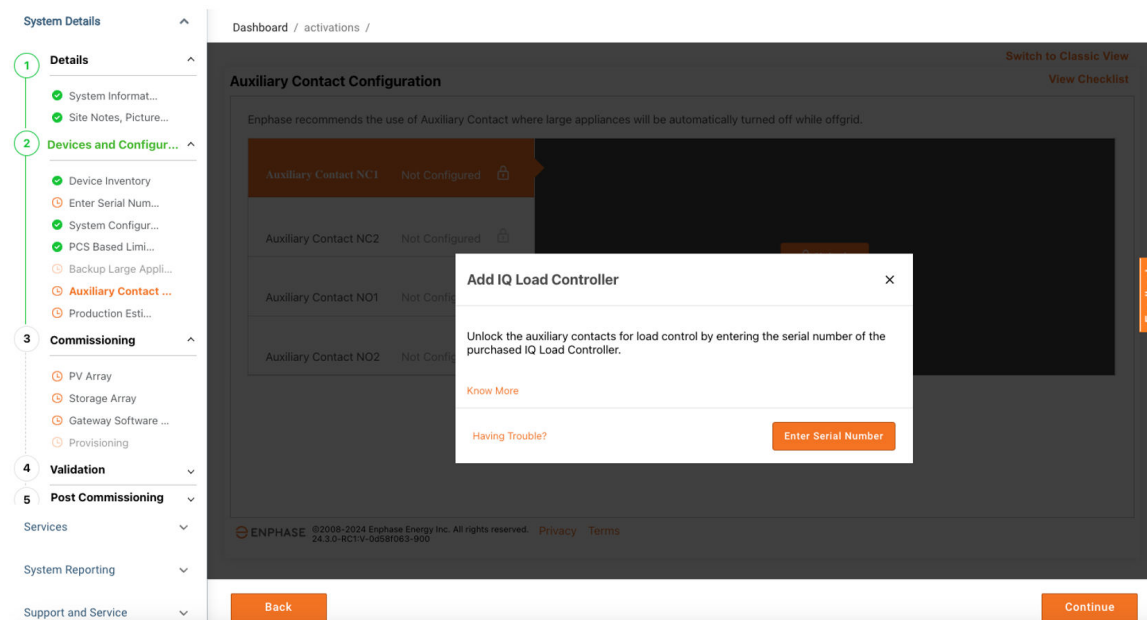
4.2.6 Auxiliary Contact Configuration

In the "Auxiliary Contact Configuration" section, you can enter the load control kit details and configure it even before visiting the site. The auxiliary contact can be unlocked by entering the serial number of the load control kit, and then, consequently, be configured. You can also choose between PV shedding and load shedding configuration.

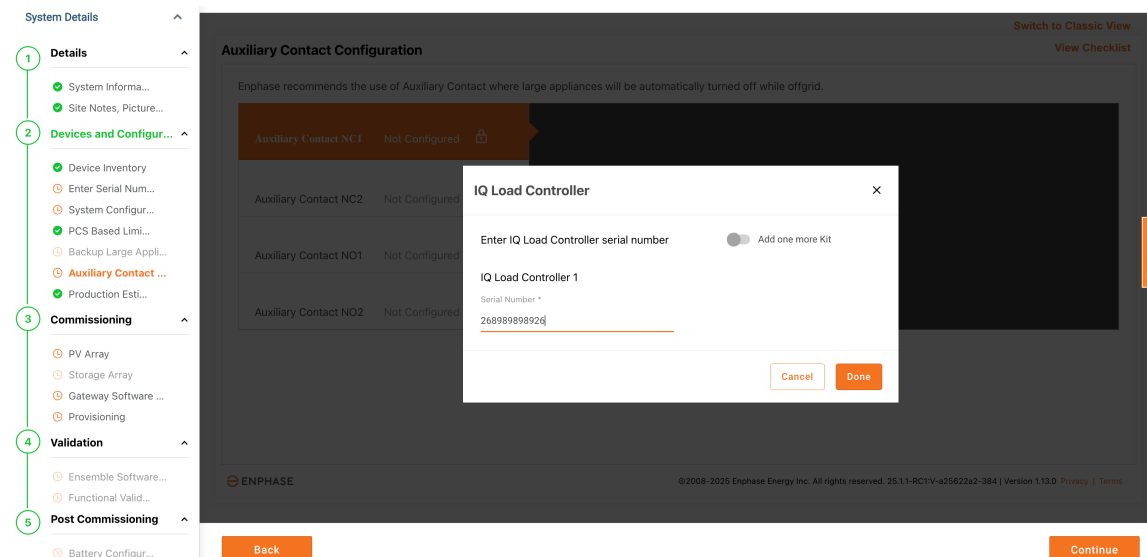
To configure Auxiliary Contact, follow these steps:

1. On the **Auxiliary Contact Configuration** window, click **Unlock**.

2. Click **Enter Serial Number**.



3. Enter the serial number.



4. Click **Configure**.

5. Select one of the following options: **PV Shedding** or **Load Control**.

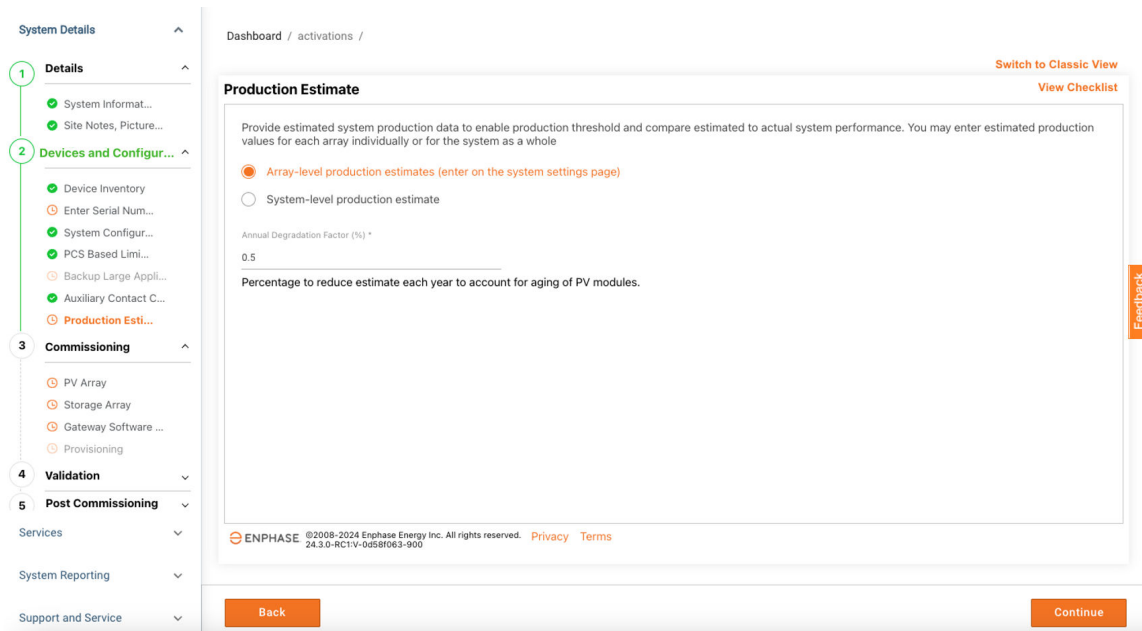
PV Shedding

Specify the microinverters required for PV shedding. If the microinverter serial numbers have not been scanned/entered, you will be prompted to specify the microinverters for PV shedding after they are scanned later in the "Enter Serial Numbers" section.

Load Control

4.2.7 Production Estimate

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The screenshot shows the 'Production Estimate' section of the Enphase system activation interface. The left sidebar contains a navigation menu with sections: System Details, Details, Devices and Configuration, Commissioning, Validation, Post Commissioning, Services, System Reporting, and Support and Service. The main content area is titled 'Production Estimate' and includes a 'Switch to Classic View' link and a 'View Checklist' link. The text explains that estimated system production data is needed to enable a production threshold and compare estimated to actual system performance. Two radio buttons are present: 'Array-level production estimates (enter on the system settings page)' (selected) and 'System-level production estimate'. Below these, there is a field for 'Annual Degradation Factor (%)' with a value of 0.5 and a description: 'Percentage to reduce estimate each year to account for aging of PV modules.' At the bottom, there are 'Back' and 'Continue' buttons. A vertical 'Feedback' button is on the right side of the main content area.

4.3 Commissioning

The "Commissioning" section can be filled in remotely at the installer's office during or after the site installation. Commissioning tasks that can be performed remotely can be executed in this section.

The "Commissioning" section consists of the following subsections:

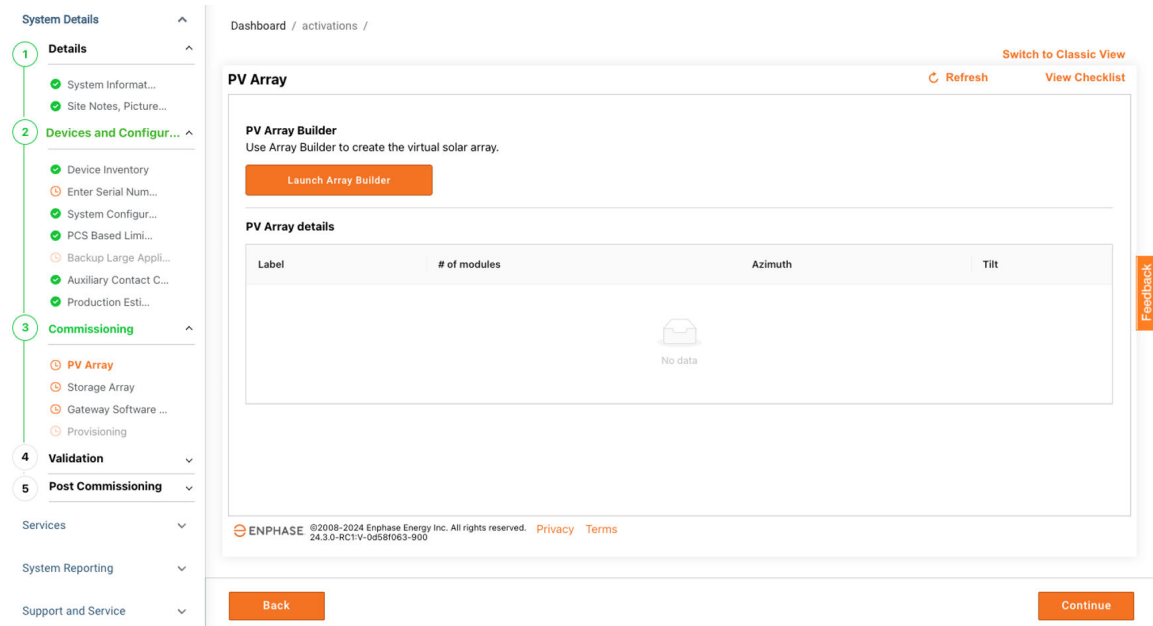
- PV Array
- Storage Array
- Gateway Software Update
- Provisioning

4.3.1 PV Array

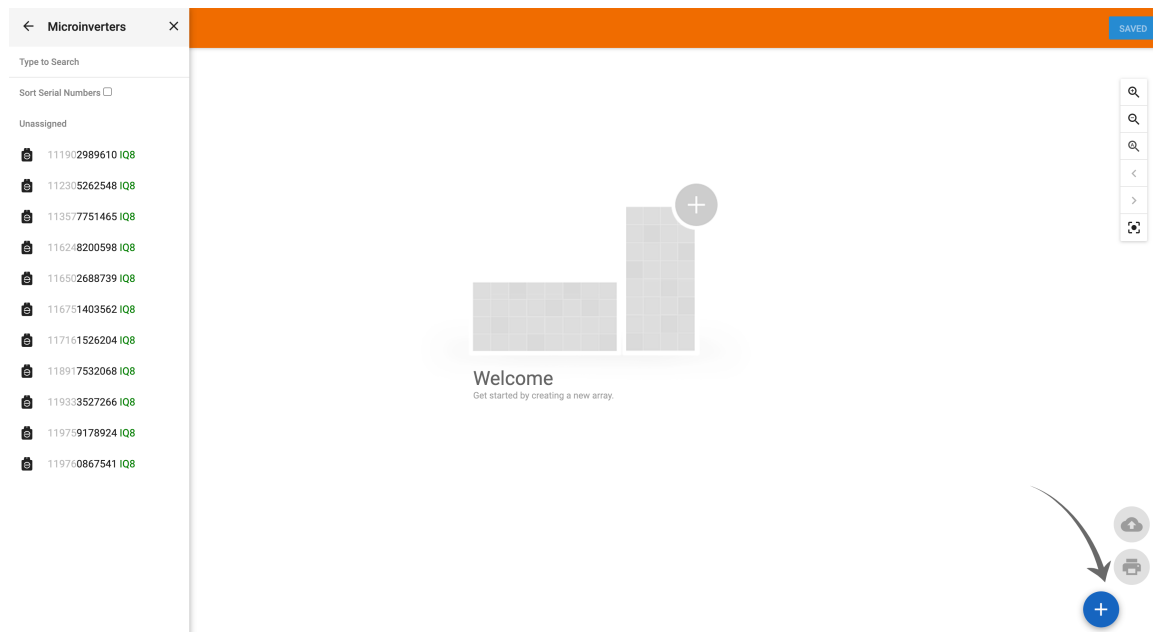
In the "PV Array" section, you can create PV arrays. The serial number details filled in earlier will be present in the "Unassigned" section of the PV Array Builder.

To create a PV array, follow these steps:

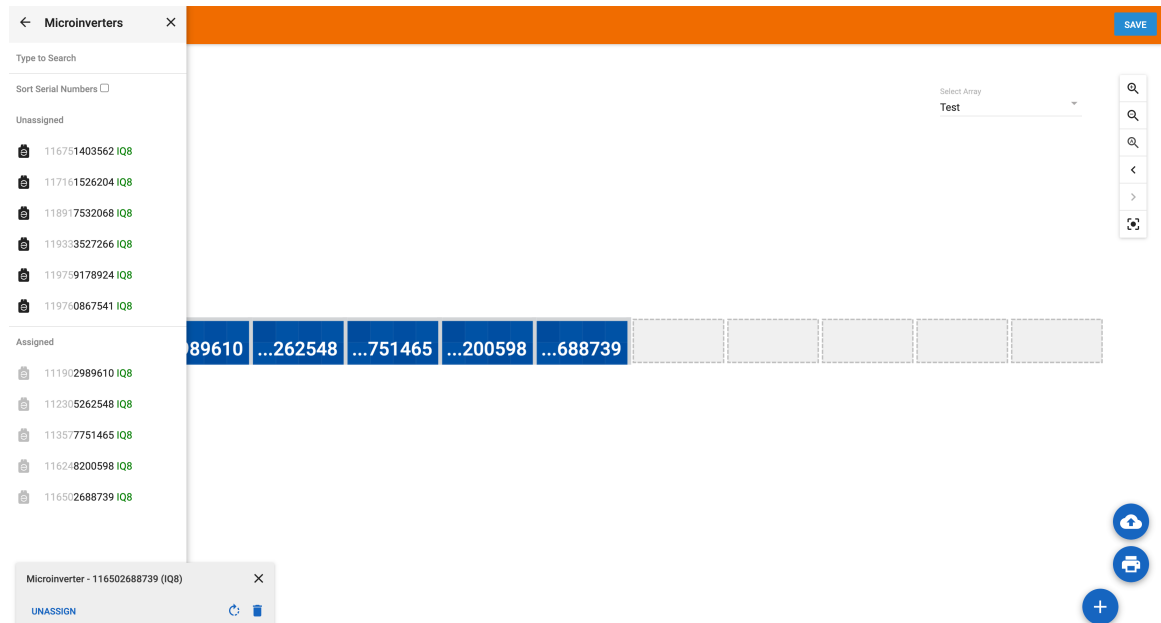
1. On the **PV Array** window, click **Launch Array Builder**.



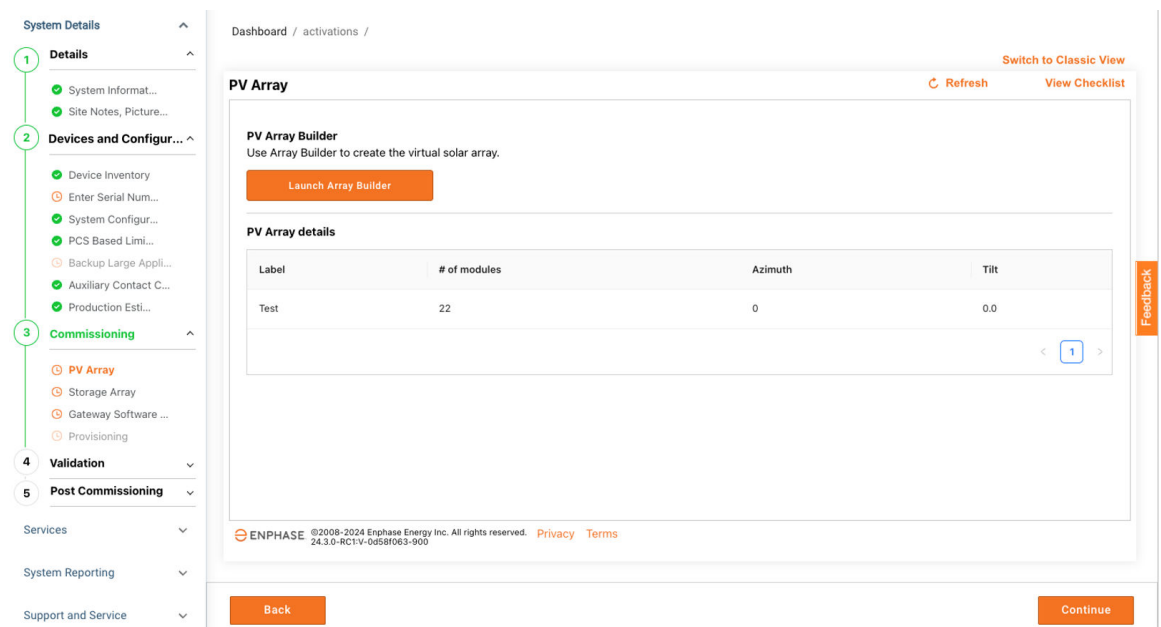
2. Click the "+" sign.



3. Add a label for the array and assign the microinverters.



The PV array details are displayed as shown.

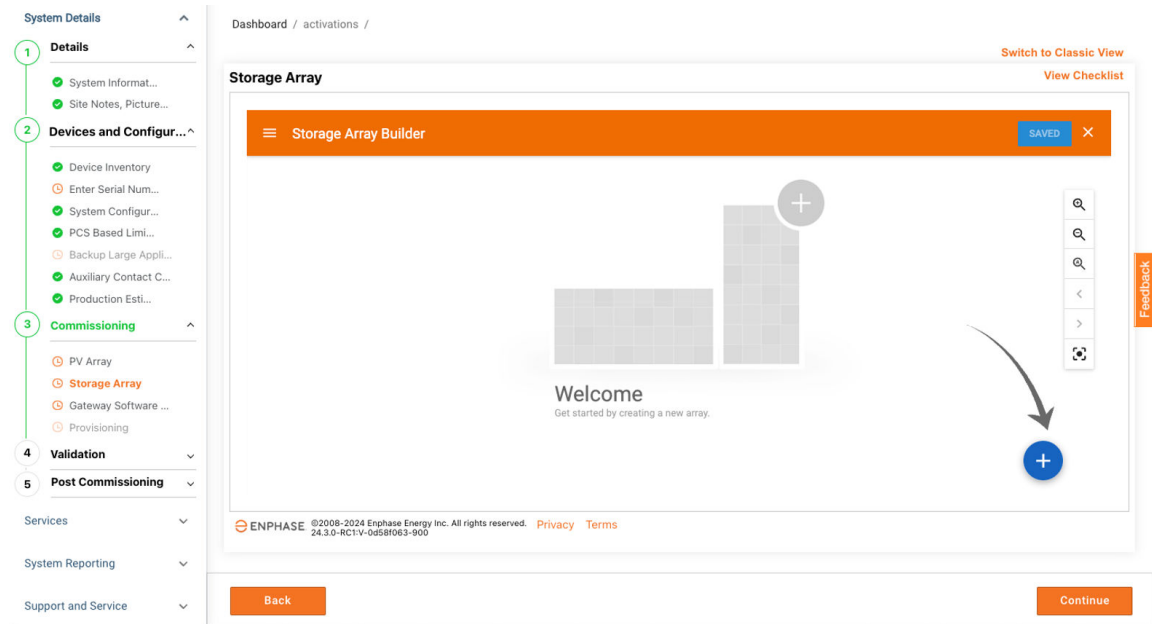


4.3.2 Storage Array

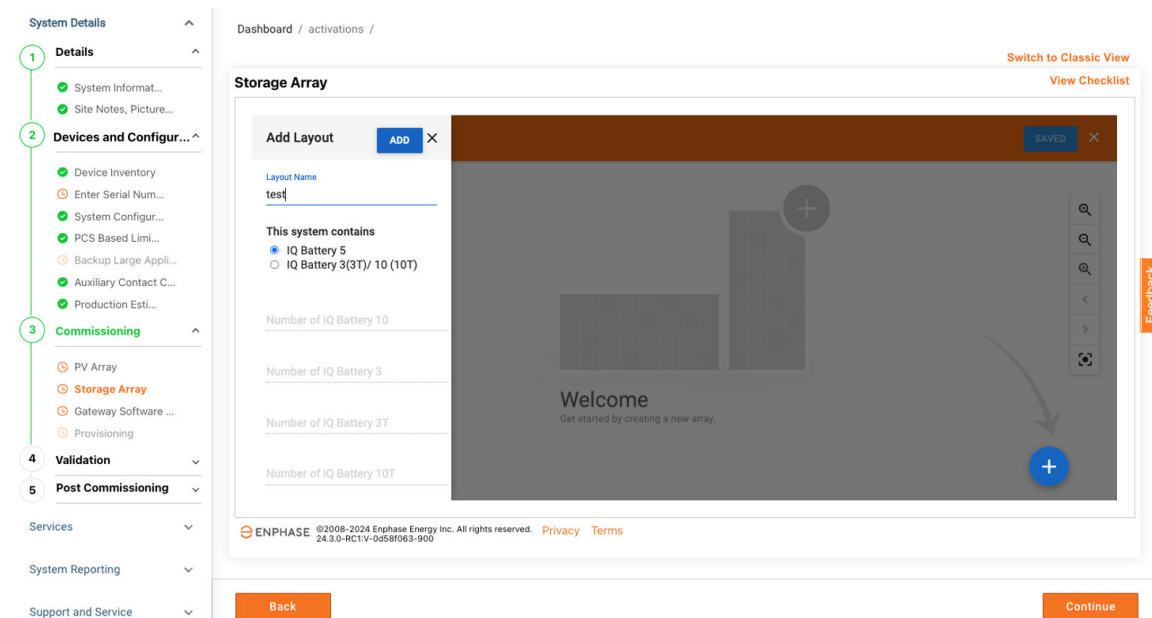
In the "Storage Array" section, you can create arrays for batteries, define the layout, specifying the type and number of storage units in the system. You can also assign serial numbers, using previously entered details available in the "Unassigned" section of the Storage Array Builder.

To create a storage array, follow these steps:

1. On the **Storage Array** window, click the "+" sign.



2. Assign the IQ Batteries as shown.



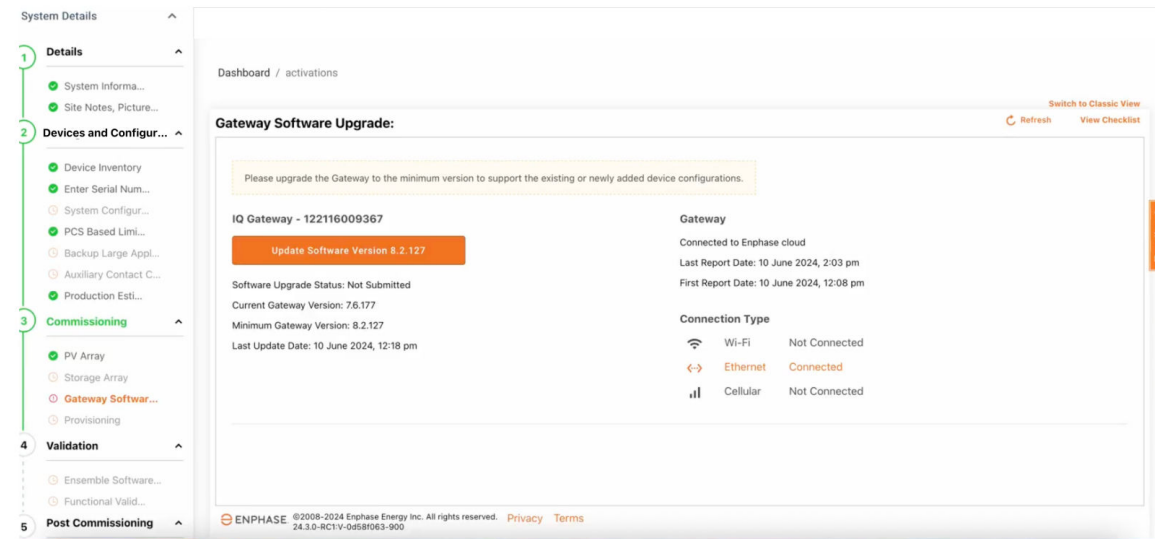
4.3.3 Gateway Software Upgrade

In the "Gateway Software Upgrade" section, you can perform the following functions:

- Check the reporting status of the gateway.
- Check the gateway firmware version. If the gateway is older than the recommended version and the gateway is online, you will be prompted to upgrade the gateway to the recommended version.

To upgrade the gateway software, follow these steps:

1. On the **Gateway Software Upgrade** window, click **Upgrade Software Version**.

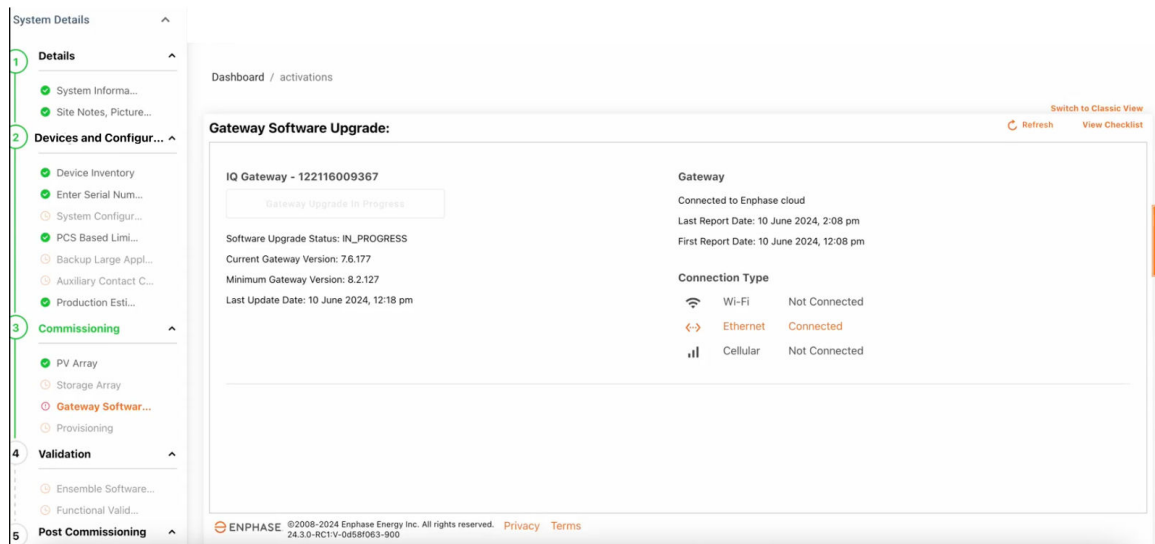


The screenshot shows the 'Gateway Software Upgrade' window. On the left sidebar, the 'Commissioning' section is active, and 'Gateway Software Upgrade' is highlighted. The main content area displays the following information:

- IQ Gateway - 122116009367**
- Update Software Version 8.2.127** (button)
- Software Upgrade Status: Not Submitted
- Current Gateway Version: 7.6.177
- Minimum Gateway Version: 8.2.127
- Last Update Date: 10 June 2024, 12:18 pm
- Gateway: Connected to Enphase cloud
- Last Report Date: 10 June 2024, 2:03 pm
- First Report Date: 10 June 2024, 12:08 pm
- Connection Type:
 - Wi-Fi: Not Connected
 - Ethernet: Connected
 - Cellular: Not Connected

A message at the top states: "Please upgrade the Gateway to the minimum version to support the existing or newly added device configurations."

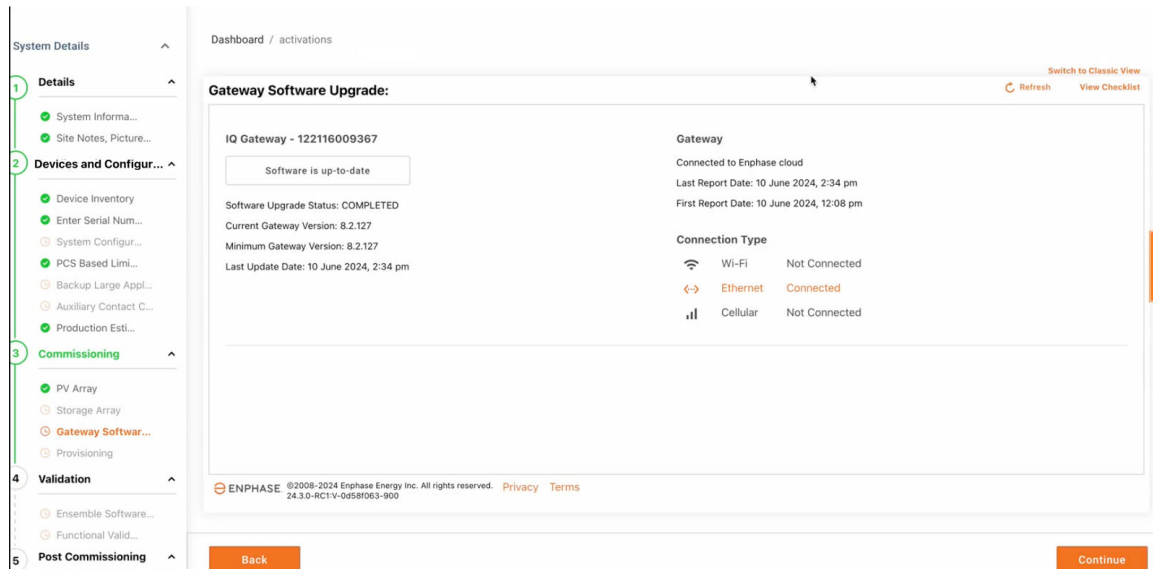
2. The software upgrade is in progress.



The screenshot shows the 'Gateway Software Upgrade' window with the status updated to 'Gateway Upgrade In Progress'. The main content area displays the following information:

- IQ Gateway - 122116009367**
- Gateway Upgrade In Progress** (status)
- Software Upgrade Status: IN_PROGRESS
- Current Gateway Version: 7.6.177
- Minimum Gateway Version: 8.2.127
- Last Update Date: 10 June 2024, 12:18 pm
- Gateway: Connected to Enphase cloud
- Last Report Date: 10 June 2024, 2:08 pm
- First Report Date: 10 June 2024, 12:08 pm
- Connection Type:
 - Wi-Fi: Not Connected
 - Ethernet: Connected
 - Cellular: Not Connected

3. The software is up-to-date.

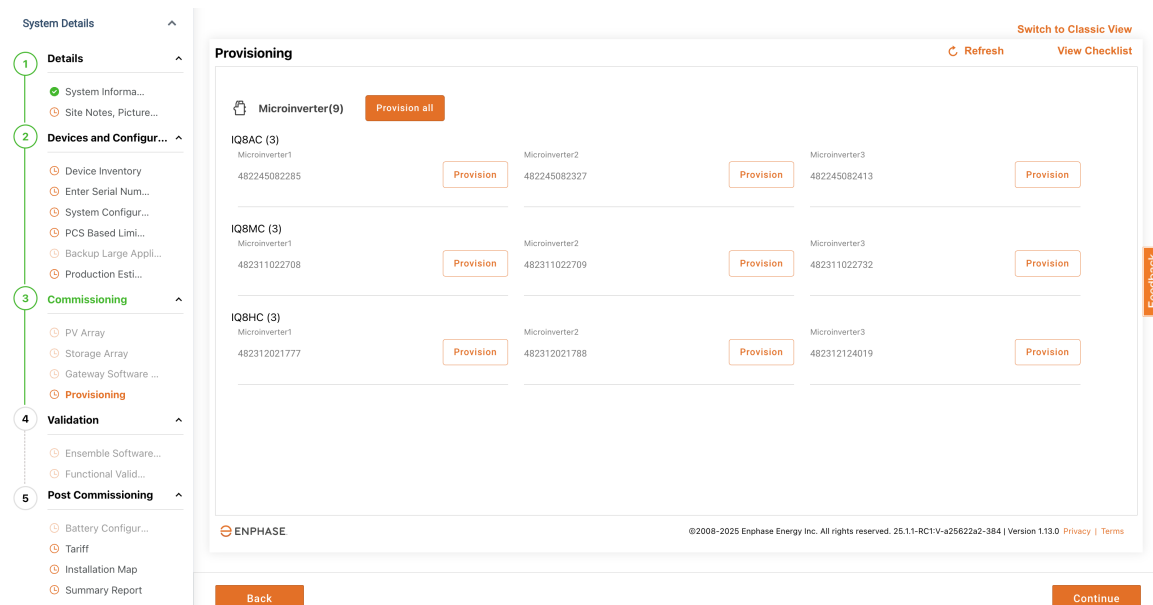


4.3.4 Provisioning

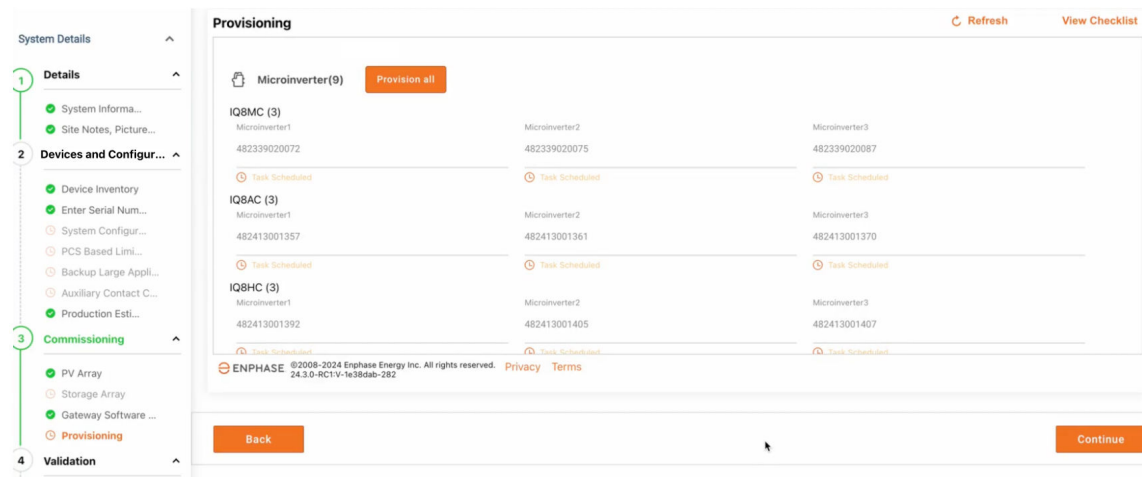
For devices that support remote provisioning, you can trigger a provisioning task for a device from this section. Currently, only microinverter provisioning is supported. After provisioning is complete, the changes will be reflected in this section.

To perform the provisioning, follow these steps:

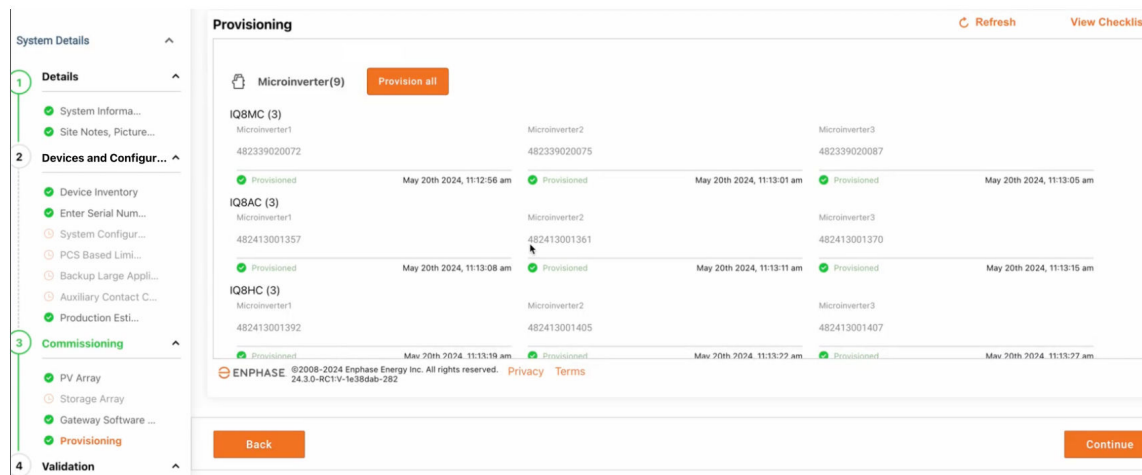
1. On the **Provisioning** window, click **Provision all**.



2. Provisioning is in progress.



3. Provisioning is complete.



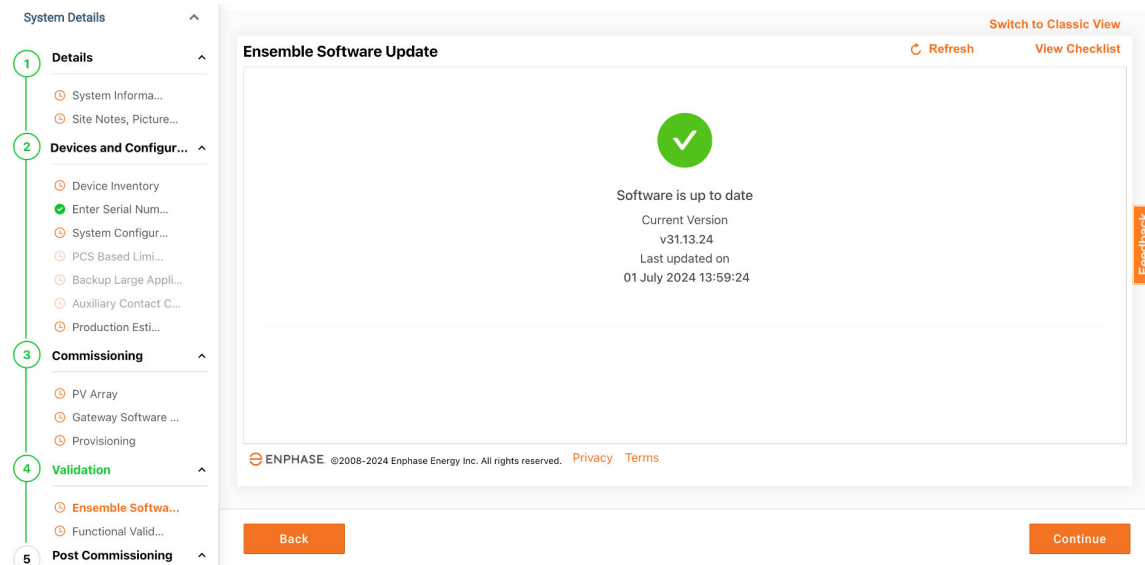
4.4 Validation

The "Validation" section can be accessed remotely or at the site after the completion of commissioning activities at the site. This section consists of the following subsections:

- Enphase Energy System Software Update
- Functional Validation

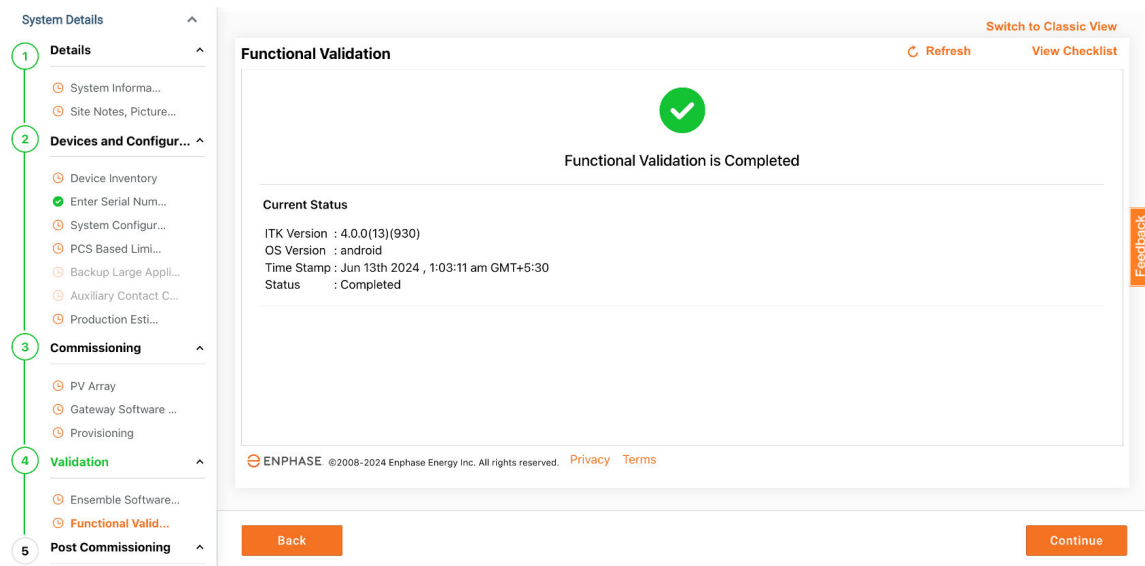
4.4.1 Enphase Energy System Software Update

This section informs you about the firmware version of the Enphase Energy System that has been installed. It also informs you if the software is up-to-date and the last updated date and time.



4.4.2 Functional Validation

The "Functional Validation" section informs you about the latest functional validation status, timestamp, Enphase Installer App (ITK) version, and OS details (Android or iOS).



4.5 Post Commissioning

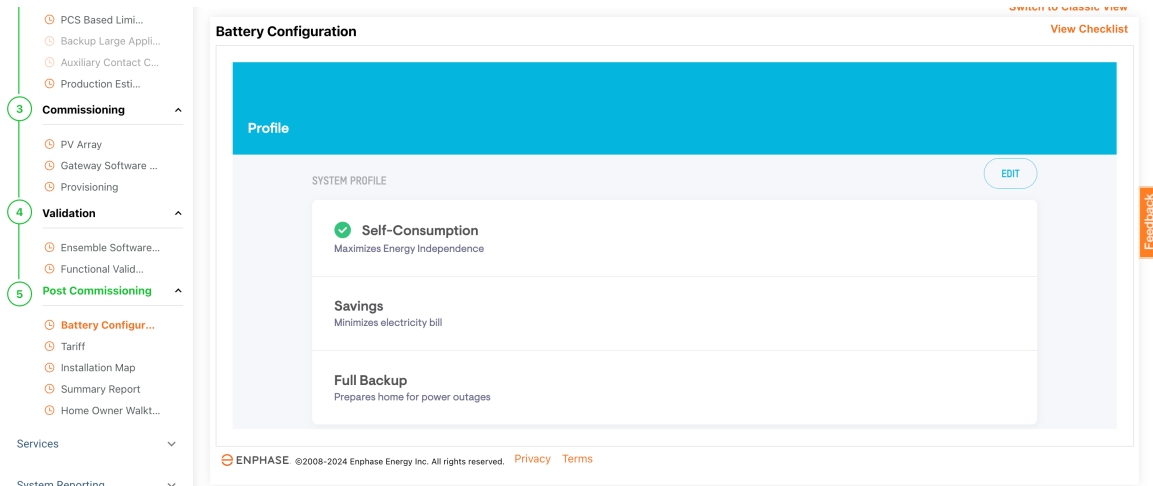
The installers can fill in this section remotely or at the site location after completing the commissioning. This section consists of the following subsections:

- Battery Configuration
- Tariff
- Installation Map
- Summary Report
- Homeowner Walk-through

4.5.1 Battery Configuration

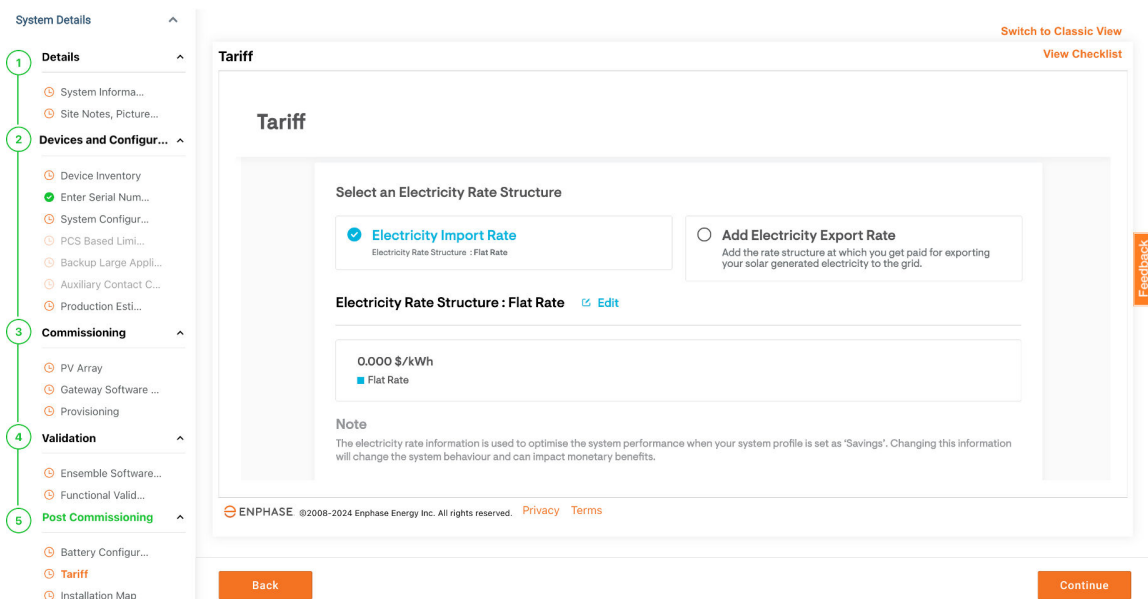
In the "Battery Configuration" section, installers can update the System Profile details for a recently installed system.

- **Self-Consumption:** Minimizes the use of electricity from the grid.
- **Savings:** Reduces electricity bills by lowering grid consumption during peak tariff hours.
- **Full Backup:** Ensures preparedness for power outages by keeping the battery fully charged.



4.5.2 Tariff

In the "Tariff" section, installers can update the tariff details that are relevant to the system that has been installed. This information can be later utilized to optimize savings or maximize energy independence, depending on the homeowner's preferences.



4.5.3 Installation Map

The "Installation Map" section can be used to update any details related to the site map, IQ Battery map, single-line diagrams of the installed system, main service panel details, or any other required additional documents.

4.5.4 Summary Report

In the "Summary Report" section, installers can view and download the summary report.

Name	Installer Reference	Owner
	NA	

Street Address 1	Street Address 2
	NA
City	State
Zip	Country

4.5.5 Home Owner Walkthrough

The "Home Owner Walkthrough" section is a reminder of the checklist of action items that the installers must complete before handing over the system to the homeowner.

2

Devices and Configur...

Device Inventory

Enter Serial Num...

System Configur...

PCS Based Limi...

Backup Large Appli...

Auxiliary Contact C...

Production Esti...

3

Commissioning

PV Array

Gateway Software ...

Provisioning

4

Validation

Ensemble Software...

Functional Valid...

5

Post Commissioning

Battery Configur...

Tariff

Installation Map

Summary Report

Home Owner Wal...

Services

System Reporting

Switch to Classic View

View Checklist

Home Owner Walkthrough

Please confirm if you discussed following topics with the site owner

1) Physical location of IQ System Controller, IQ Battery and Gateway

2) Loads/Appliances in back up

3) Enlighten App Overview

a) Live Status and Energy view

b) Different Battery Storage modes of operation

c) Storm Guard feature

4) Enphase community, Installer and Enphase Customer Support (email, chat, phone)

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Back

Finish

Feedback

5. Revision history

Revision	Date	Description
USG-00015-2.0	January 2025	Updated the "Accessing the Activations page" and "Details" sections.
USG-00015-1.0	July 2023	Initial release.