

Fleet Management dashboard

Applicable regions: North America

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1. Introduction

The Fleet Management dashboard enables installer partners and asset owners to efficiently manage their fleets and monitor system performance with ease.

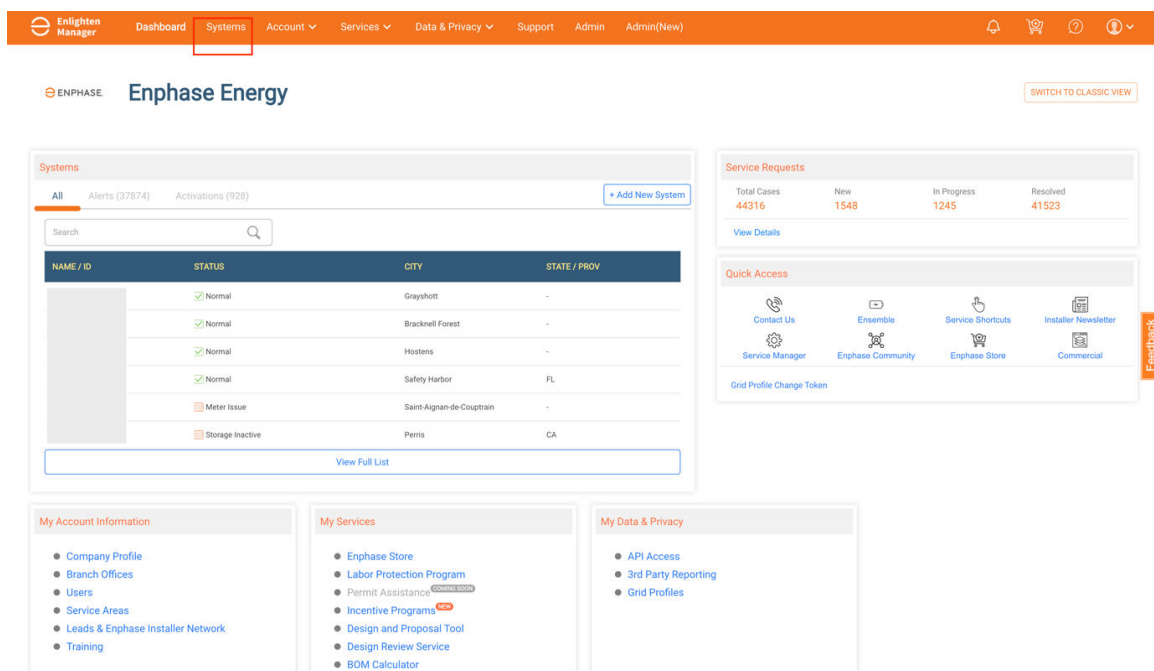
Key highlights

- **Filters:** Apply filters to view relevant site data—such as system status, system type, location, and more—across all dashboard views.
- **Overview:** Offers a customizable, aggregated view of the installer’s fleet based on various performance metrics.
- **Map View:** Enables installers to visualize their fleet on an interactive map, with access to individual system-level information. The widget also allows users to group nearby sites into clusters and view aggregated cluster-level data.
- **System List:** Provides individual site-level information in a list view.

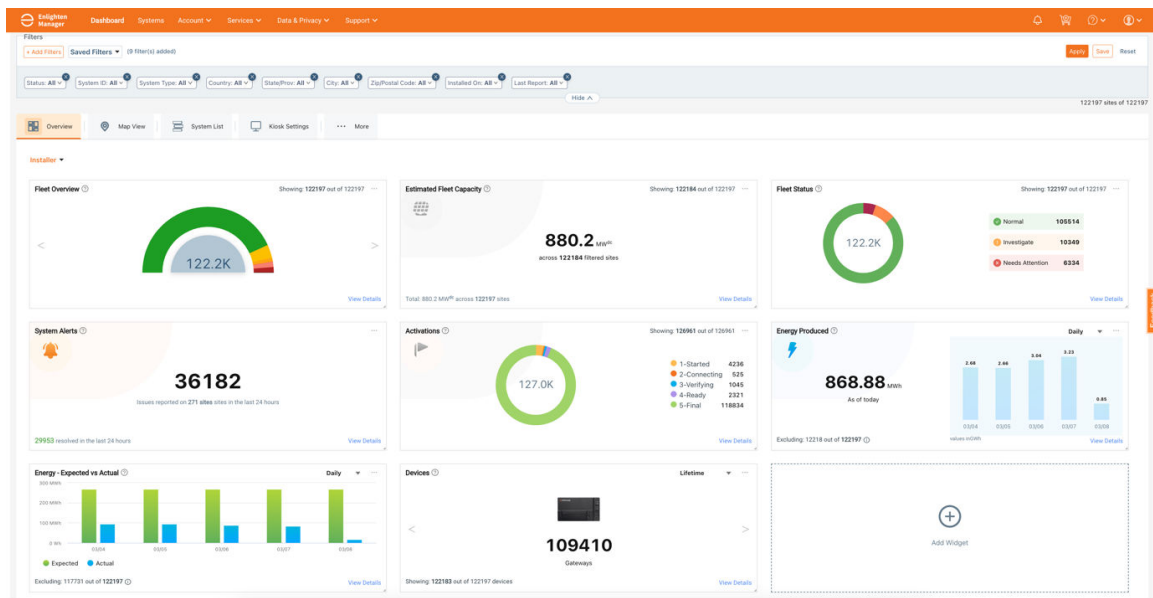
2. Fleet Management dashboard

2.1 Entry point

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



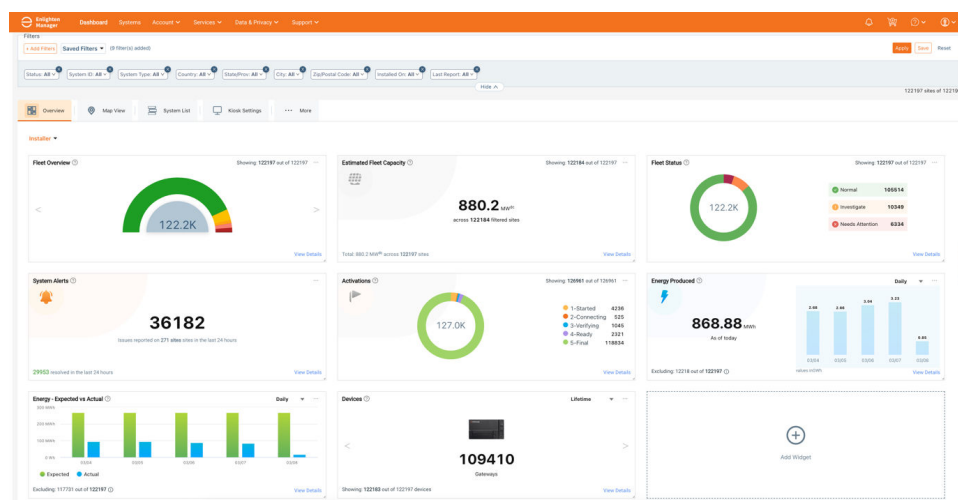
The screenshot shows the Enphase Energy Installer Portal. The top navigation bar is orange with the Enphase logo and the text "Enphase Energy". The "Systems" tab is highlighted. Below the navigation bar, the "Systems" section is visible, showing a table of systems with columns for NAME / ID, STATUS, CITY, and STATE / PROV. The table lists several systems, including Grayscott, Bracknell Forest, Hostens, Safety Harbor, Saint-Aignan-de-Couptrain, and Perris. To the right of the table, there is a "Service Requests" section with a table showing Total Cases (44316), New (1548), In Progress (1245), and Resolved (41523). Below this, there is a "Quick Access" section with links to Contact Us, Ensemble, Service Shortcuts, Installer Newsletter, Service Manager, Enphase Community, Enphase Store, and Commercial. At the bottom, there are three sections: "My Account Information" (Company Profile, Branch Offices, Users, Service Areas, Leads & Enphase Installer Network, Training), "My Services" (Enphase Store, Labor Protection Program, Permit Assistance, Incentive Programs, Design and Proposal Tool, Design Review Service, BOM Calculator), and "My Data & Privacy" (API Access, 3rd Party Reporting, Grid Profiles).



2.2 Feature description

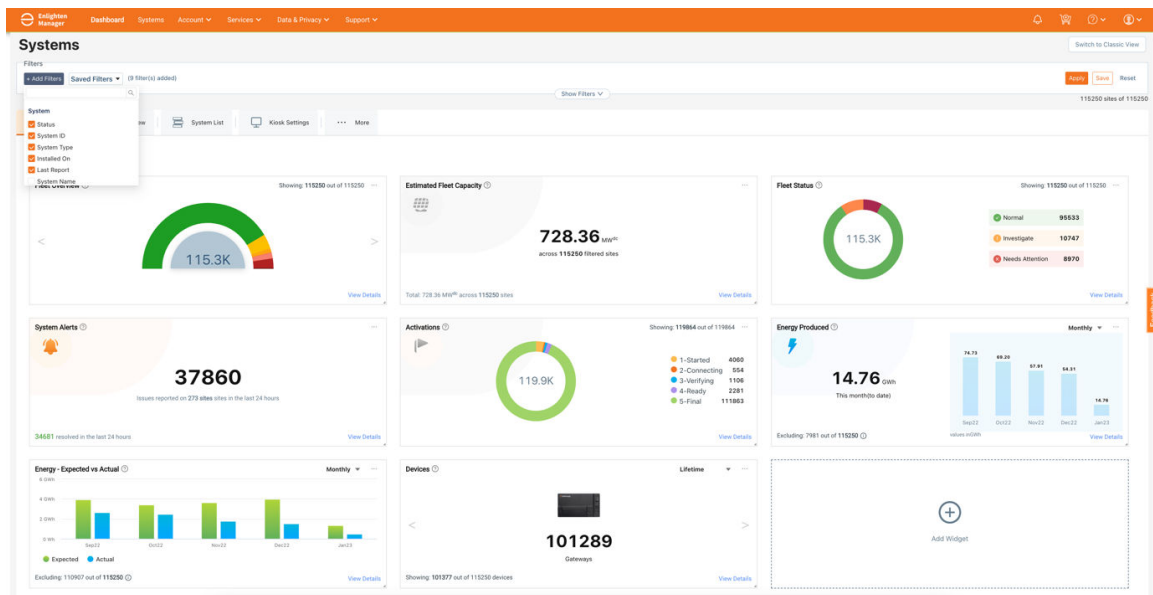
2.2.1 Filters

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.



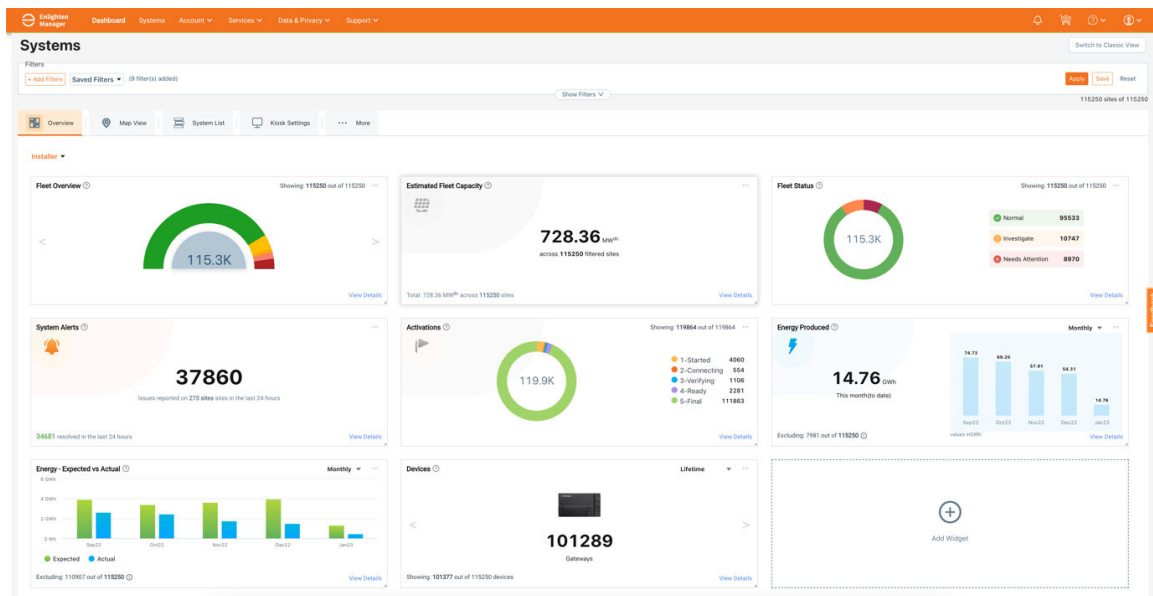
To support customizable views based on user preferences, global filters can be added or edited directly on the dashboard.

- To add or edit filters, click **Add Filters** at the top-left of the screen, select the check box 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 enter a filter name.
- To select saved filters, click the **Saved Filters** drop-down menu and choose the desired filter.



2.2.2 Overview tab

The **Overview** tab provides a default dashboard view tailored to the user's role, displaying a set of predefined widgets. These widgets help users monitor fleet performance through various key metrics.



2.2.3 Different roles assigned to each user

Users or companies are assigned the following roles.

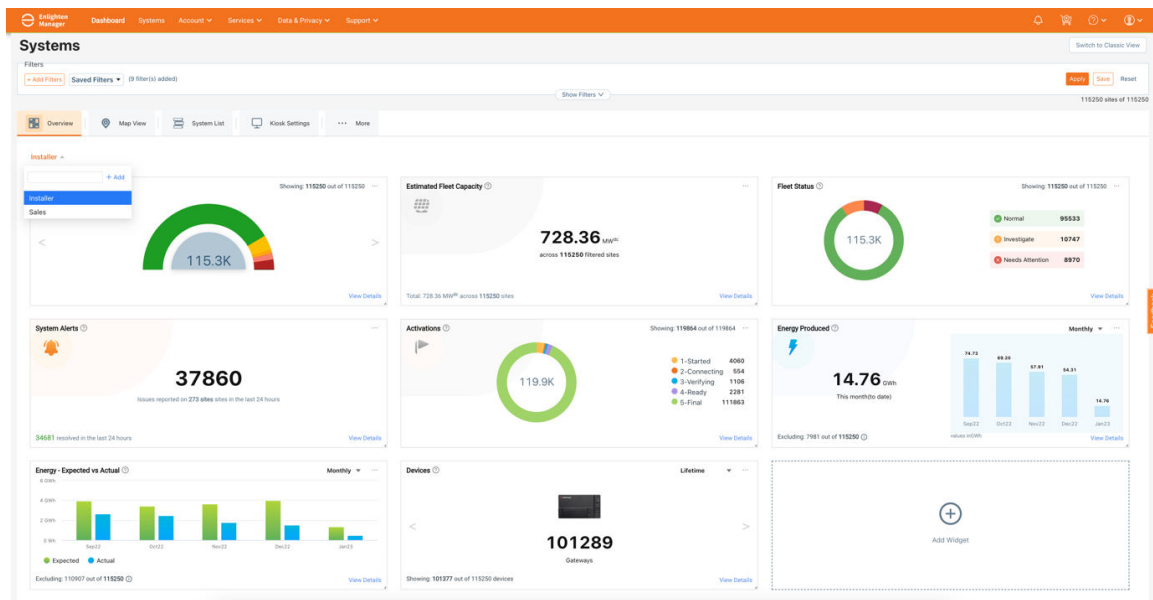
- **Installer:** Responsible for the installation of Enphase systems. The default view for an installer has the following widgets visible under each head.
 - What is the status of my fleet?
 - Estimated Fleet Capacity
 - Fleet Overview
 - Fleet Status

- 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 a 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

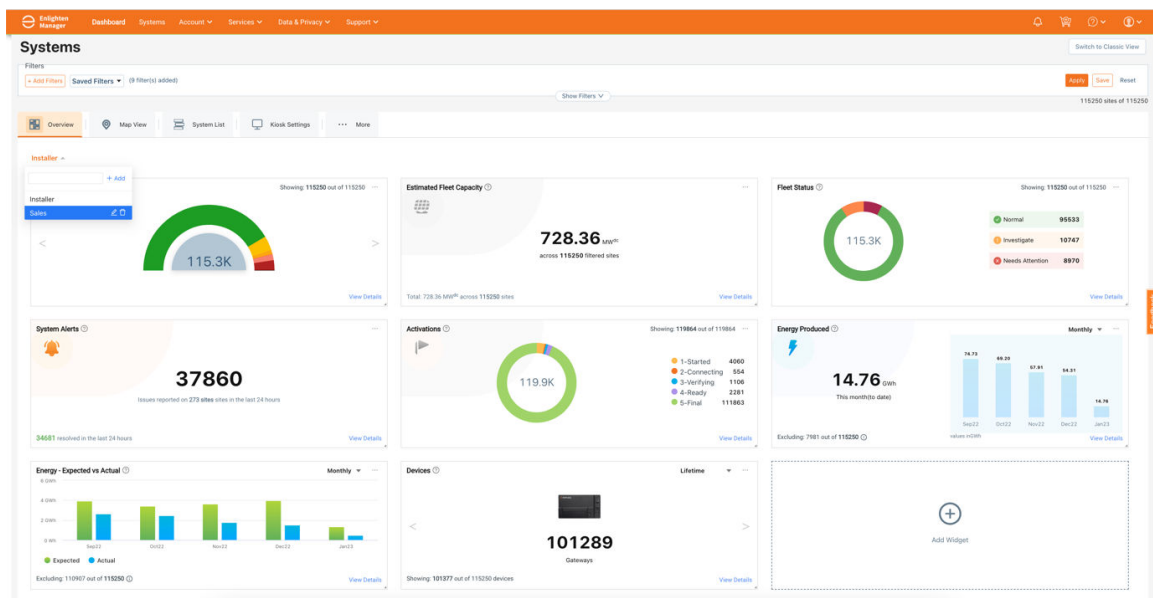
2.2.4 Add/edit profiles in the Overview tab

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.

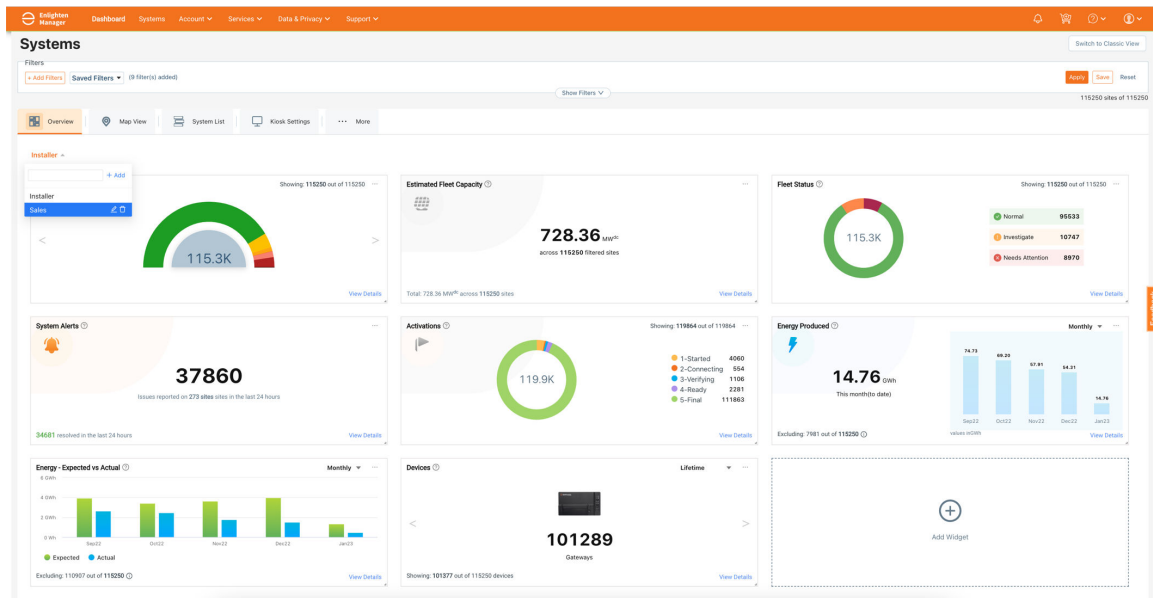
- To add a new profile, click the drop-down menu in the top-left corner below the **Overview** tab, enter a name for the user profile, and click **Add**.



- To navigate to a specific user profile, click the drop-down menu located in the top-left corner below the **Overview** tab, and select the desired profile.

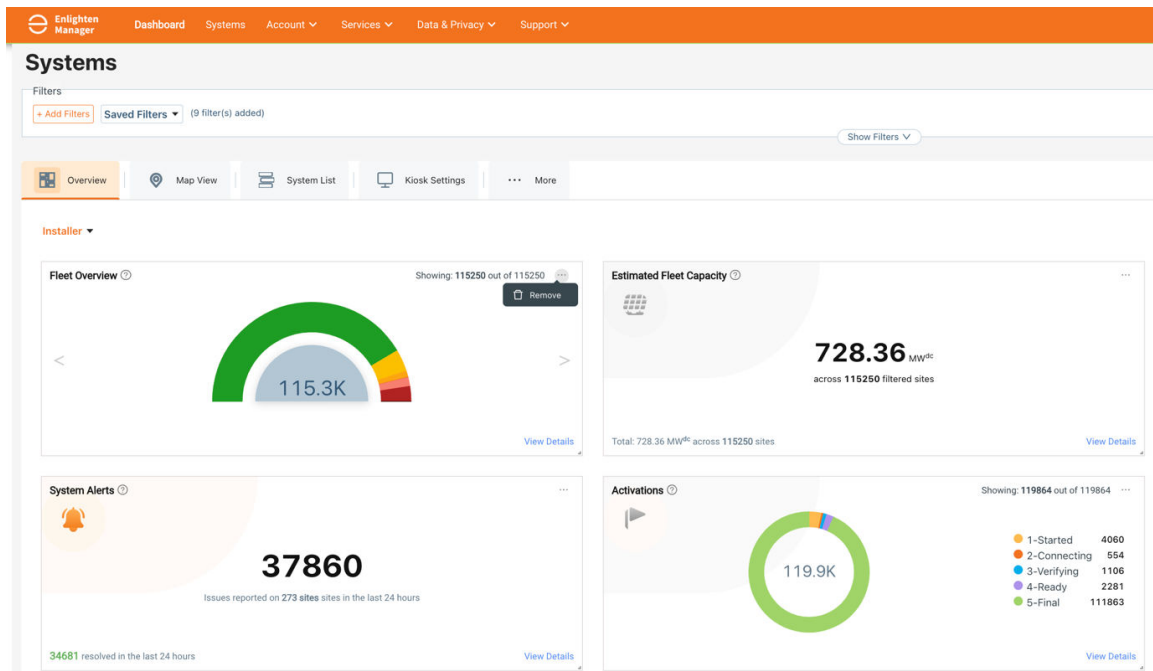


- To edit a profile name or delete a specific profile, click the edit icon or trash icon respectively, located next to the profile name.



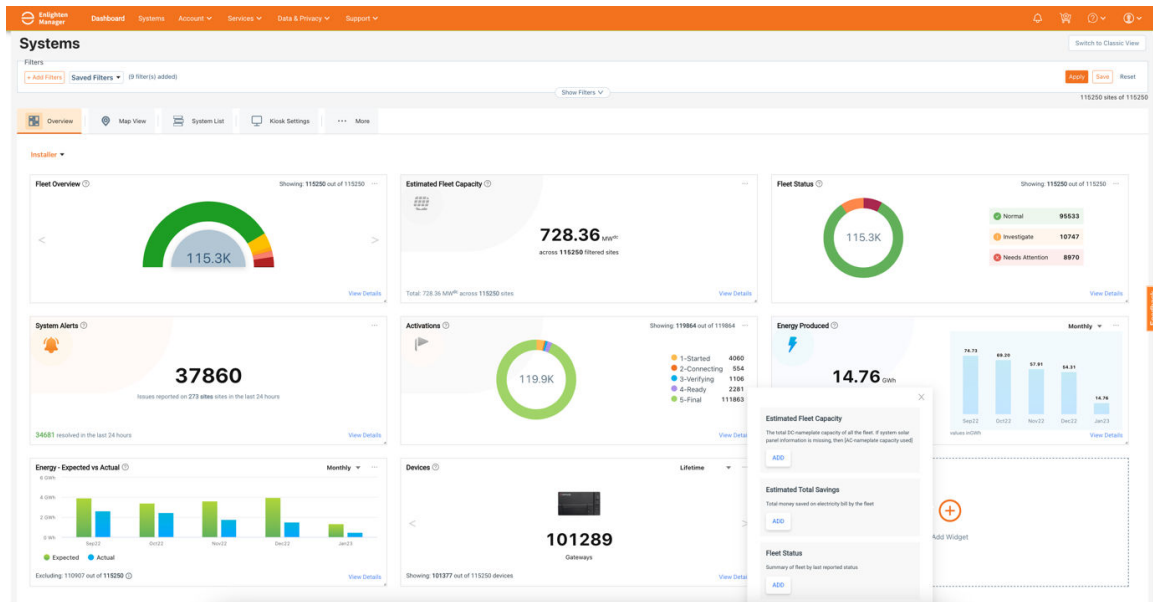
2.2.5 Removing widgets in the Overview tab

To remove a widget, click the three-dot menu in the top-right corner of the widget and select **Remove**. This action deletes the widget from the selected profile or view.



2.2.6 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.



2.2.7 Widgets in the Overview tab

The Overview tab in the Fleet Management dashboard offers a variety of widgets that provide key insights into fleet performance. Below are the available widgets and their functionalities:

- **Estimated Fleet Capacity:** Displays the total capacity of all systems in the fleet. Click **more details** to view system-level capacity data.
- **Fleet Status:** Shows the overall health of the fleet based on system statuses. The statuses are categorized as:
 - **Normal:** Sites with system status marked as Normal.
 - **Investigate:** Sites with system status indicating issues such as:
 - Microinverters not reporting
 - ACB not reporting
 - Check and update Envoy not reporting
 - Check and update Encharge not reporting
 - Check and update Enpower not reporting
 - **Needs Attention:** Sites with any other status not listed under Normal or Investigate.
- **Energy Produced:** Displays the total energy generated by the fleet. Users can view energy production data on a daily, monthly, or yearly basis.
- **Energy Produced vs. Consumed:** Compares the expected energy production with actual energy consumption across the fleet. A bar graph illustrates the data for the past five months.
- **Energy Expected vs. Actual Produced:** Compares the expected energy output with the actual energy produced by the fleet. The data is visualized as a bar graph for the past five months.
- **Activations:** Shows the number of ongoing activations across the fleet, categorized by stages: Start, Connecting, Verifying, Ready, and Final. The data is presented in a donut chart alongside a detailed list.
- **Fleet Overview:** Displays the total fleet size in kW DC and the number of sites. It also includes a summary of site statuses in a list format.
- **Environmental Benefits:** Highlights the environmental impact of the fleet, including:
 - Carbon offset per year (in tons)
 - Number of trees planted
 - Number of cars taken off the road

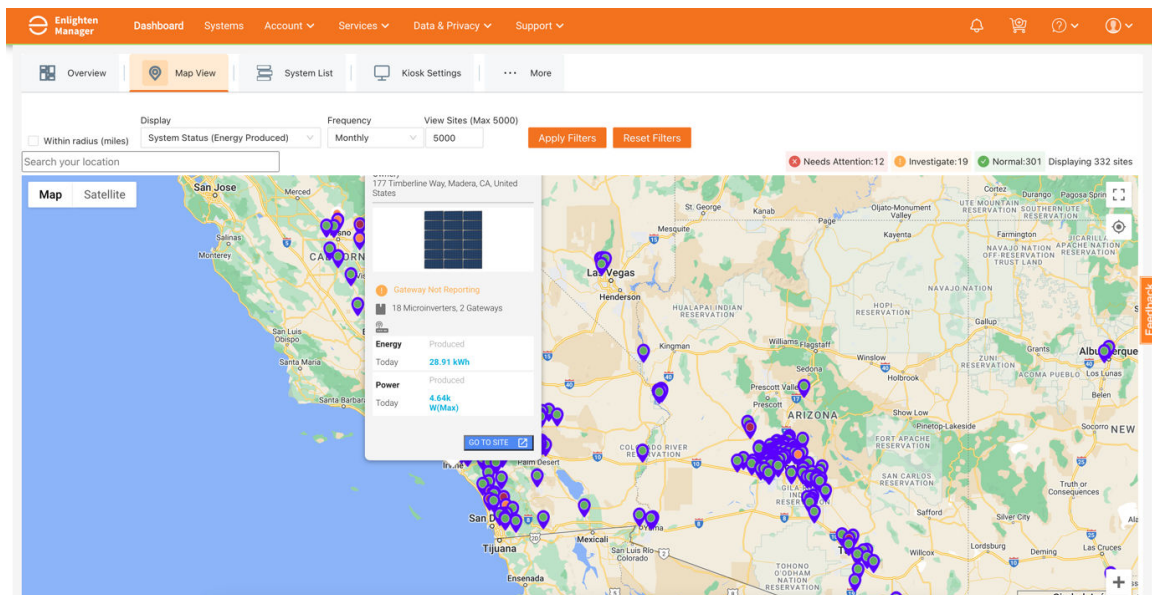
These metrics are calculated based on energy production (kWh).

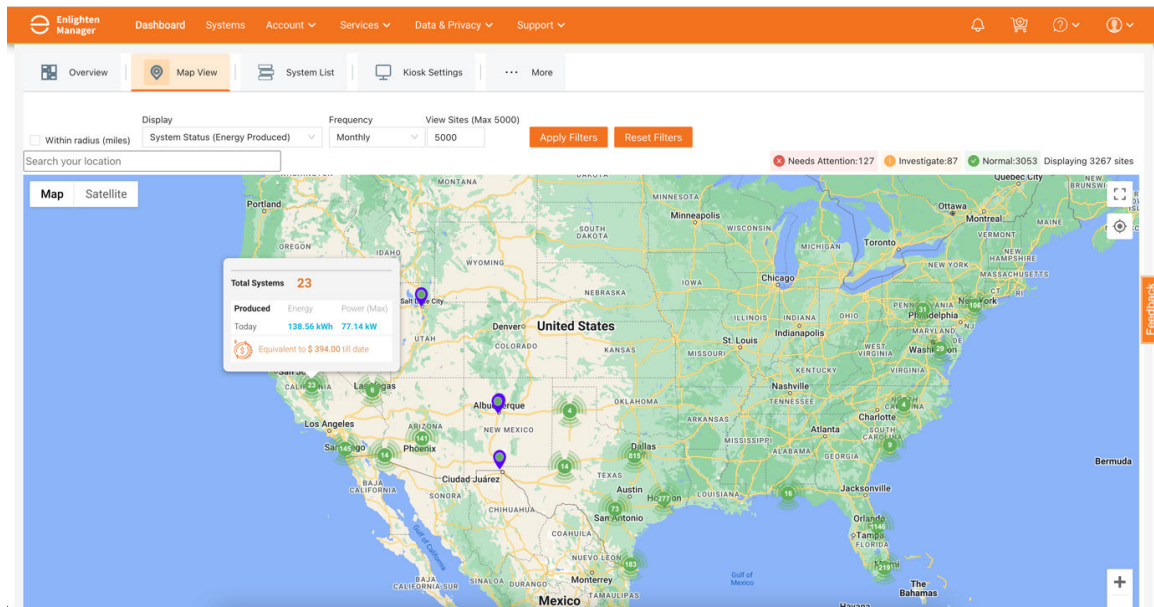
- **System Alerts:** Displays the number of alarms with warning severity reported in the last 24 hours across the user's fleet. It also shows the number of such alarms that have been resolved within the same time frame.
- **Site Leader:** This widget includes a toggle to switch between two views: Yield and Savings.
 - **Site Leader Yield:** Shows the energy produced per kW DC at each site, allowing users to compare site performance based on dollar savings. The top-performing site (in terms of kWh/kW) is highlighted.
 - **Site Leader Savings:** Displays the dollar savings per kW DC at each site, helping users identify the most cost-effective systems. The top-performing site (in terms of \$/kW) is highlighted.
- **Devices Installed:** Provides a count of all devices installed.
- **Estimated Savings:** Shows the total electricity bill savings achieved through the fleet's energy production. Users can filter the data by daily, monthly, or yearly intervals using the filter option in the top-right corner of the widget.

2.2.8 Map View tab

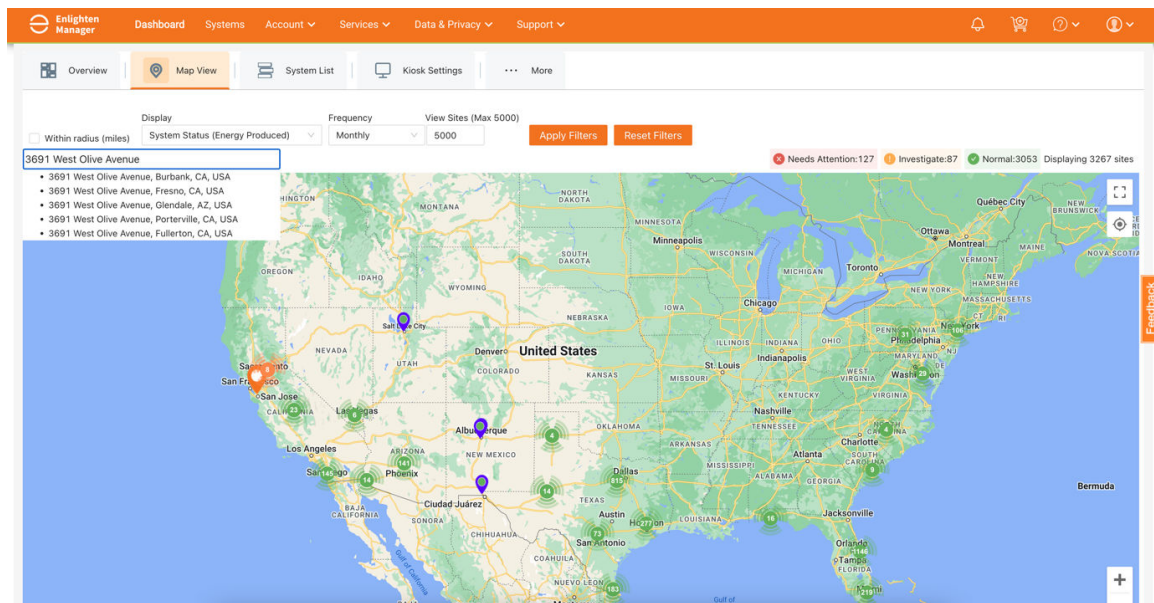
The Map View allows users to visualize their systems on an interactive map, providing a spatial overview of the fleet.

- Users can view up to 5,000 sites on the map at any given time.
- Systems located close to each other are automatically grouped into clusters for easier navigation.
- To explore individual systems within a cluster, click the cluster to zoom in and reveal more detailed views.
- To view system or cluster details, hover over the respective system or cluster on the map.



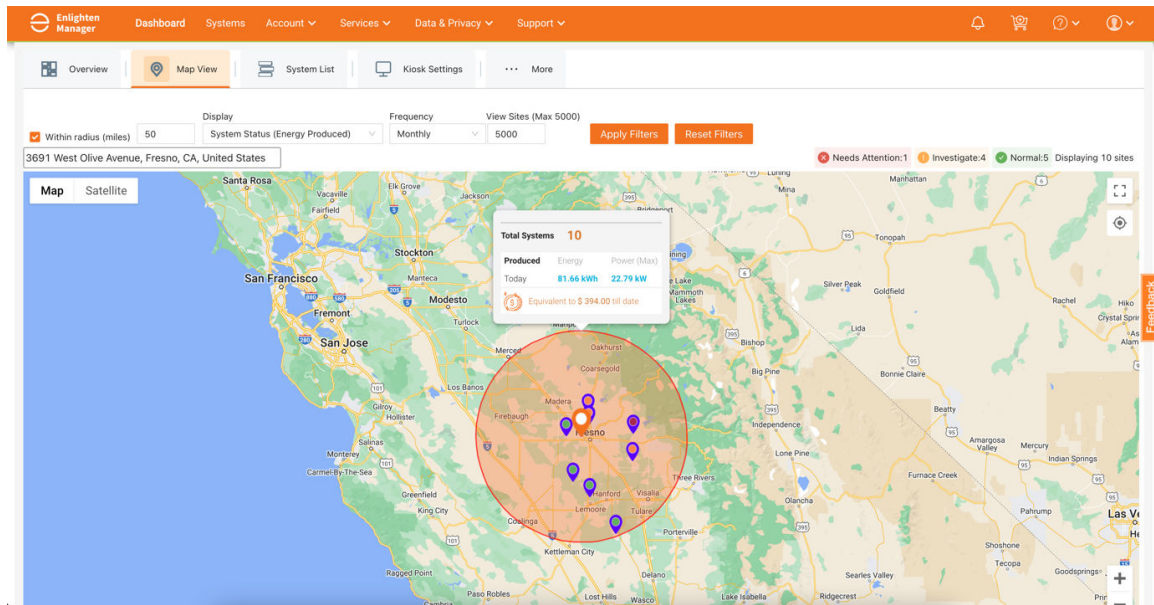


- To search by address, enter the desired address into the search bar. See below.



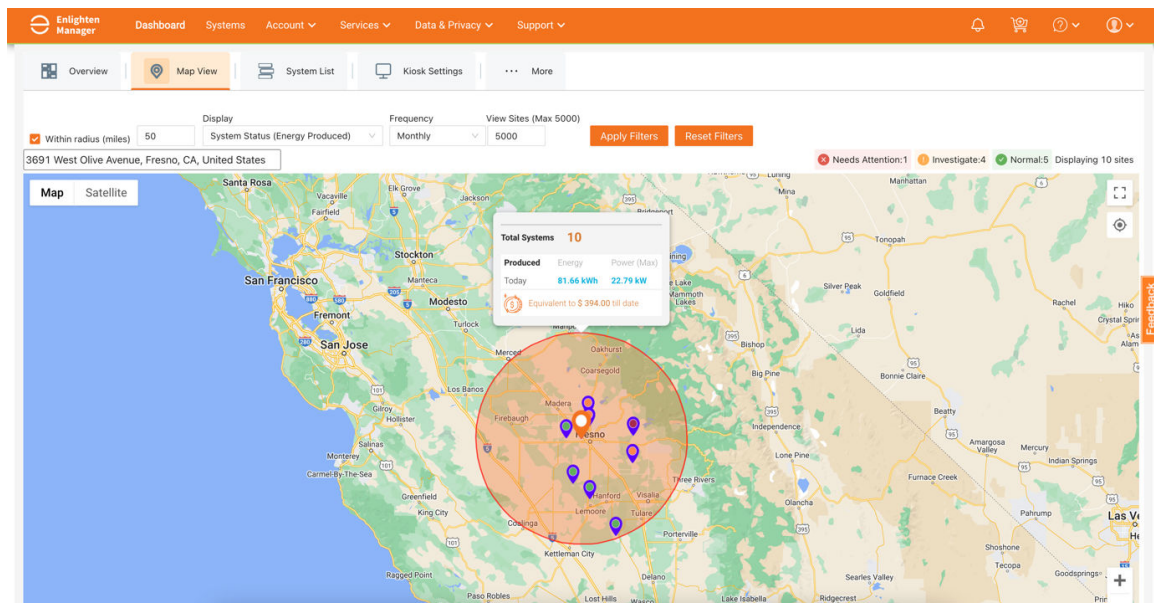
- To see systems in and around the chosen address, select the **Within Radius** checkbox and enter the radius.

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.



2.2.9 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 modify the visible columns, click the column settings button in the top-right corner. Then, select or deselect check boxes next to each column name as needed.
- To group systems together, click **Add Systems to a Group**, then select and add the desired systems.
- To view only the systems within a specific group, use the **Group** option available in the global filter.

The screenshot shows the 'Systems' page in the Enphase Fleet Management dashboard. The top navigation bar includes links for Dashboard, Systems, Account, Services, Data & Privacy, and Support. The 'Systems' page has a 'Filters' section with 'Add Filters' and 'Saved Filters' buttons, and a 'Show Filters' button. Below the filters is a 'System List' tab. The table displays 115250 records, with a '100 / page' dropdown. The table columns are: Status, City, State/Prov, Installed On, Last Report, Energy Produced - T..., and Energy Produced - L... The table shows various system statuses like 'Gateway Not Reporting', 'Production Issue', 'Normal', and 'Microinverters Not Reporting'. A 'Feedback' button is visible on the right side of the table.

3. Revision history

Revision	Date	Description
USG-00016-1.0	July 2023	Initial release.