



**AUTEL**<sup>®</sup>  
Powering the Planet

# **CLOUD OPERATORS MANUAL**



## GETTING STARTED

Your sales representative will provide you with the following website link at the time of purchase to obtain your cloud credentials. <https://autelenergy.us/pages/register>

This page is where you will enter in the information for your cloud account. Once approved, you will receive your login and temporary password, along with the Autel Charge Cloud website URL link.

The onboarding email with your cloud credentials will contain instructional videos, user manuals and additional training material related to using the Autel Charge Cloud.

## INFORMATION YOU WILL PROVIDE

### REQUIRED INFORMATION

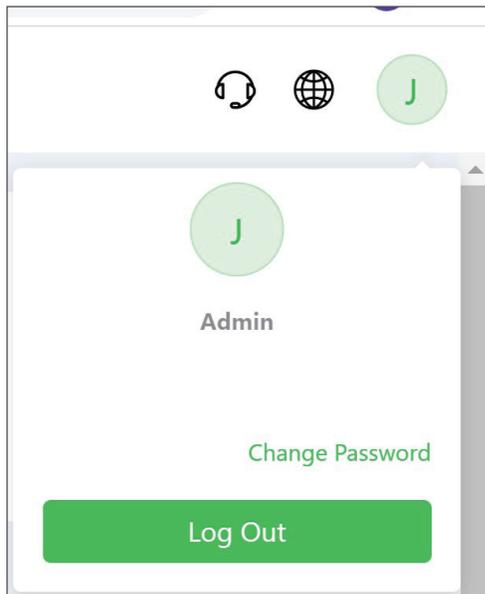
- Company Name
- Tax ID
- Company Address
- Primary Contact
- Email of Primary Contact
- Admin Account Name
- Phone/Email  
(These will be the account ID when you log in in Autel Charge Cloud)

### OPTIONAL INFORMATION

- Business License No.
- Legal Representative ID
- Mailing Address
- Postal Code
- Alternate Contact
- Alternate Contact No.
- Official Website
- License Photo
- Operator Logo

# IMPORTANT

Autel highly recommends that you change the Password immediately once you log in for the first time. Click on the avatar in the top right corner and click Change Password. Input the old password and enter the new password twice.

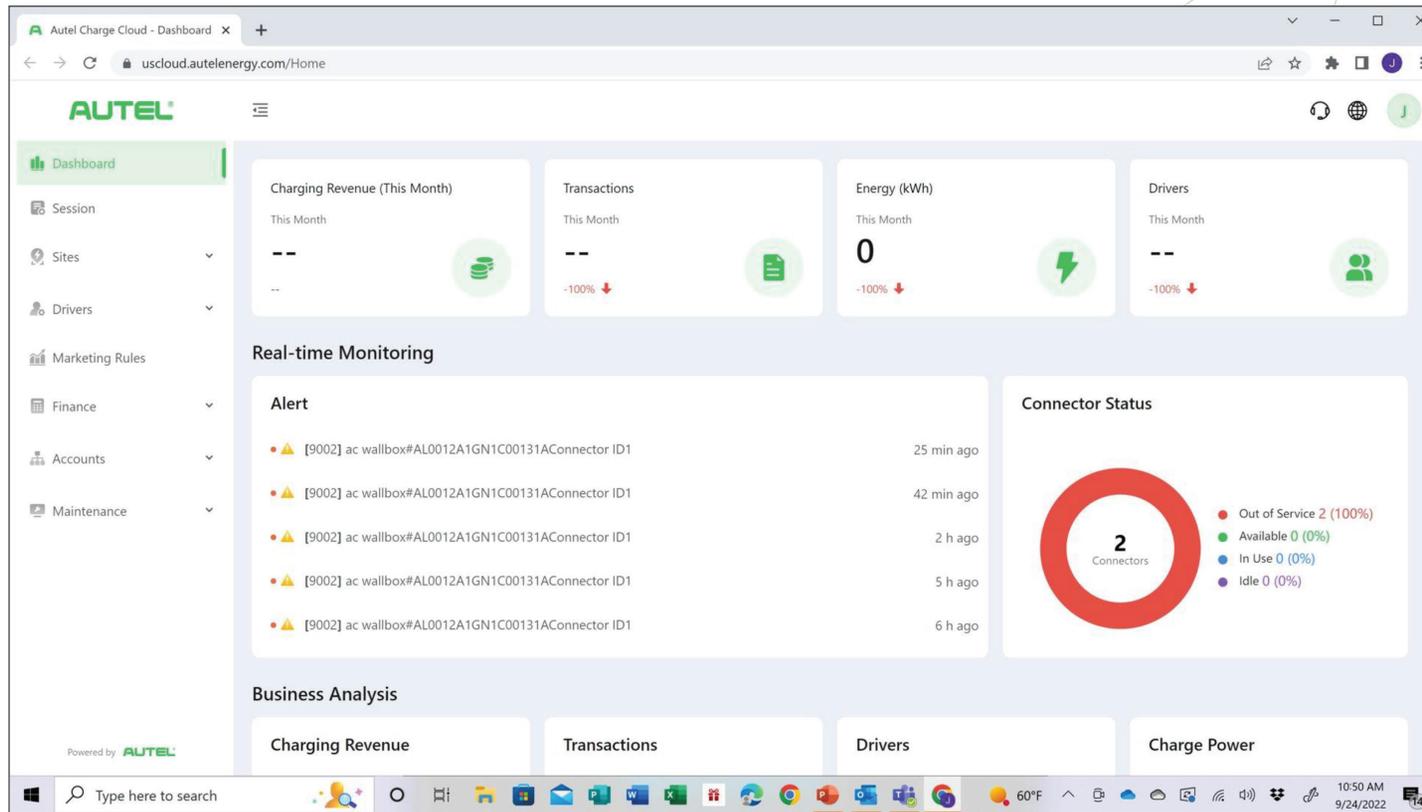


A screenshot of the 'Change Password' modal form. The form has a title bar with 'Change Password' and a close button (X). It contains three input fields, each with a red asterisk indicating a required field:

- \* Old Password: Enter old password
- \* New Password: Enter new password
- \* Confirm New Password: Enter new password again

A green 'Submit' button is located at the bottom right of the form.

# CLOUD DASHBOARD



## CHARGING REVENUE

Total Revenue from ALL Sites and Chargers

## TRANSACTIONS

Total Transactions from ALL Sites

## ENERGY (kWh)

Total kWh from ALL Sites

## DRIVERS

Total Unique Drivers from ALL Sites

## ALERT

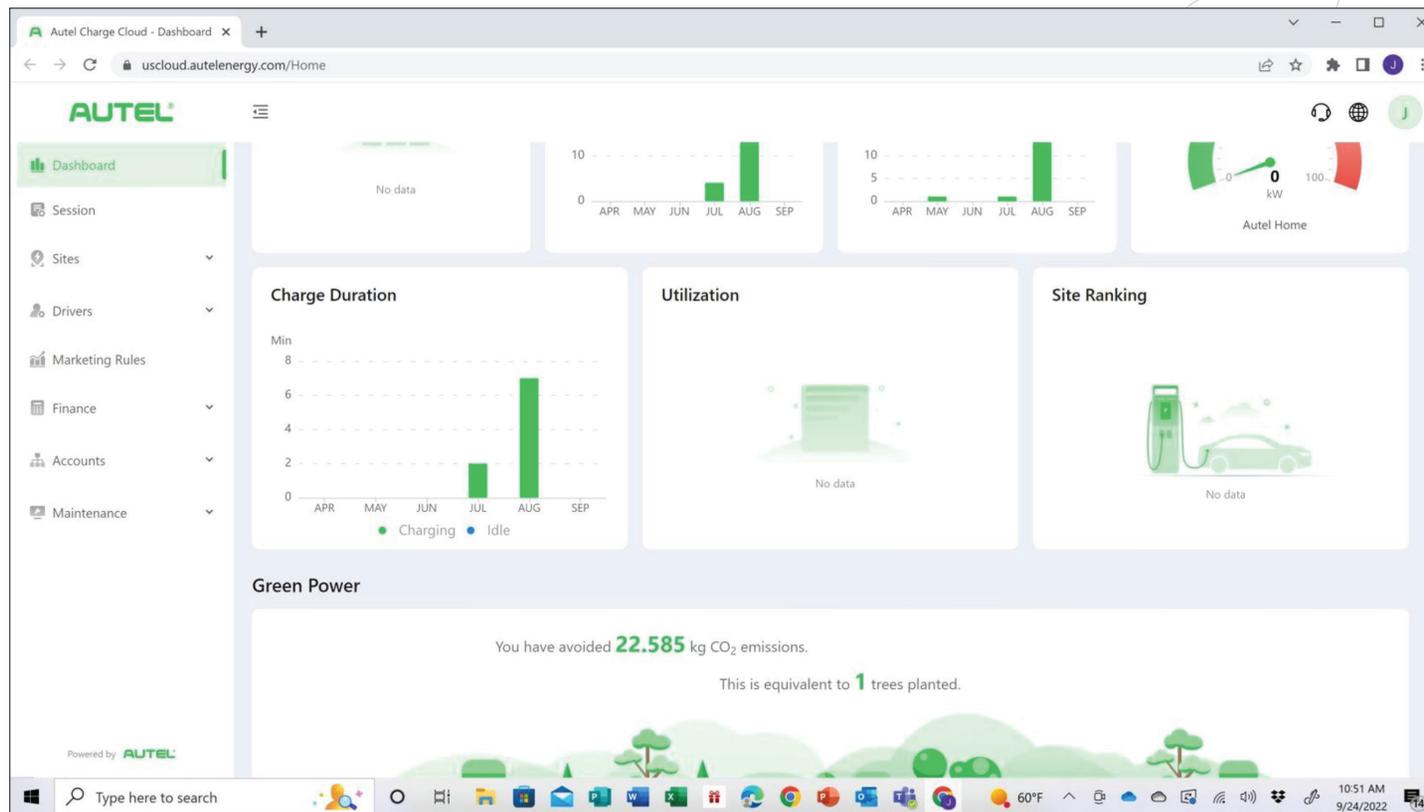
Active Alerts from Chargers at Various Sites

## CONNECTOR STATUS

Total number of connectors at sites and their status

\*Note: Green numbers represent an increase in business. Red represents a decrease in business

# CLOUD DASHBOARD



## CHARGE DURATION

Represents the total amount of time spent charging vehicles among all chargers in operation.

## SITE RANKING

View how each site compares to each other.

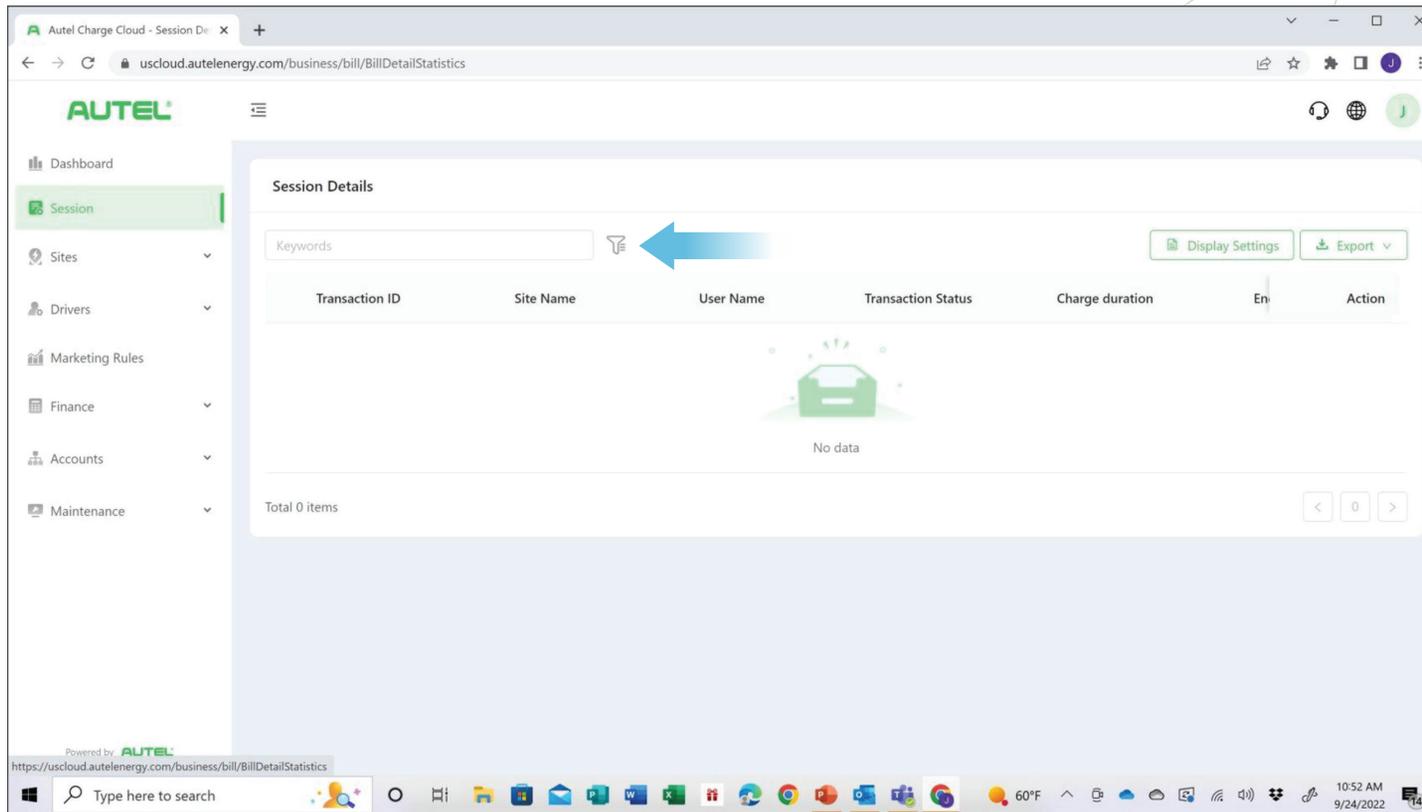
## UTILIZATION

Displays the Utilization Rate (%) among all chargers in operation. This data helps determine when to install additional chargers as utilization increases over time.

## GREEN POWER

Represents the amount of Co2 Emissions Saved and calculates the equivalent number of trees planted it would take to achieve the same positive effects.

# SESSIONS DETAILS



Locate the specific details of any Charging Session.  
Click the "Filter" icon to begin your selection.

# SELECTING A SESSION

The screenshot shows the 'Session Details' page in the Autel Charge Cloud application. The search filters are set to 'home' for Site Name, 'Completed' for Transaction Status, and '2022-08-01' to '2022-08-31' for the Date Range. The table below shows the results of these filters.

Transaction ID	Site Name	User Name	Transaction Status	Charge duration	Energy(kWh)	Action
AU22081900013590	home	-	Completed	11s	0.0000	<a href="#">i</a>
AU22081900013231	home	-	Completed	6s	0.0000	<a href="#">i</a>
AU22081900012390	home	-	Completed	8s	0.0000	<a href="#">i</a>

Select the Site, then the Type of Session to be viewed, and then the Date of the Specific Session you want to be view.

Finally, find the Specific Session below.

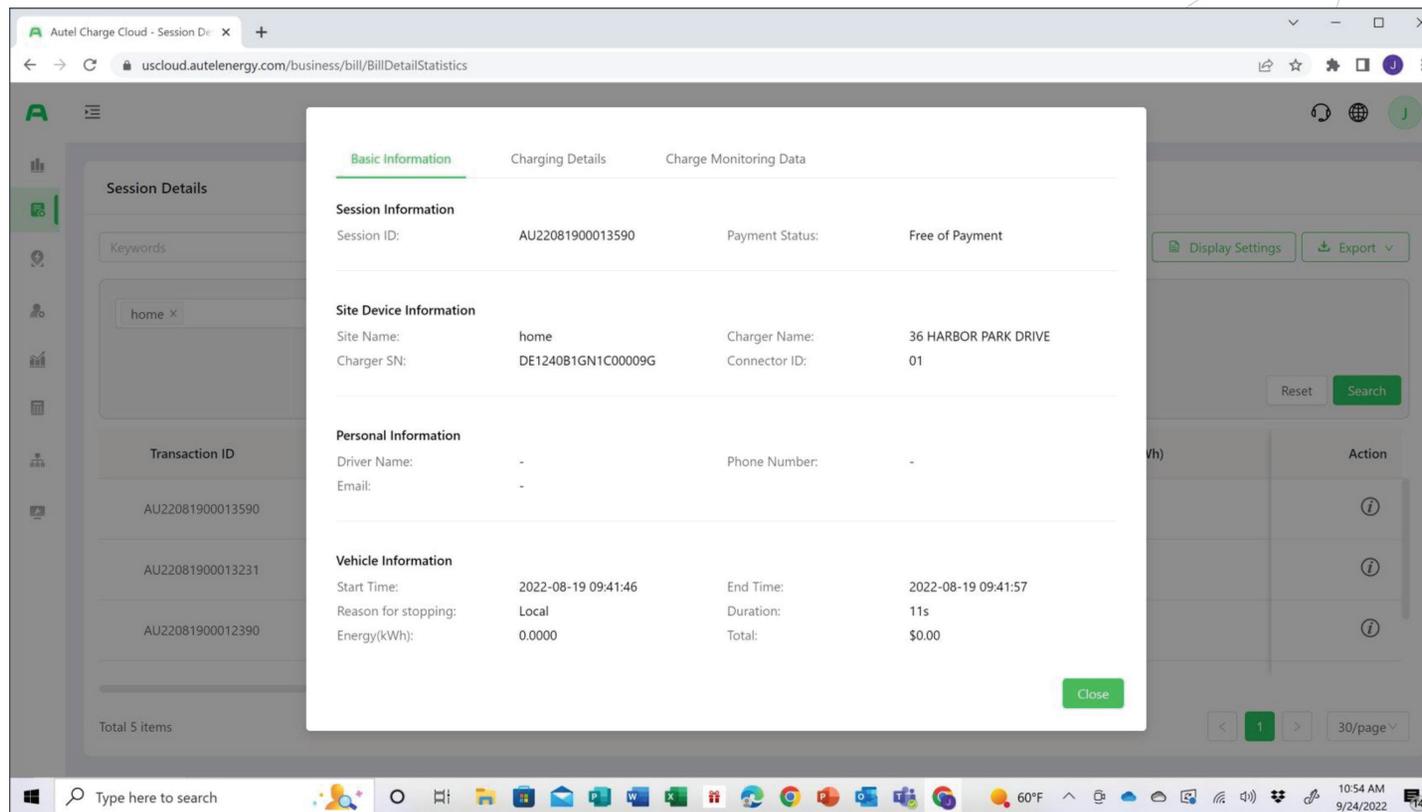
**EXAMPLE SHOWN:**

**Site** = Home Type

**Status** = Completed

**Dates** = Month of August

# SESSION DETAILS: BASIC INFORMATION



The first menu bar allows a basic overview of the session selected.  
This page provides Vehicle Information (when available), the Session ID,  
Type of Payment, and other useful information.

# SESSION DETAILS: CHARGING DETAILS

The screenshot displays the 'Autel Charge Cloud' web application interface. The browser address bar shows the URL: `uscloud.autelenergy.com/business/bill/BillDetailStatistics`. The page is divided into three main sections: 'Basic Information', 'Charging Details', and 'Charge Monitoring Data'. The 'Charging Details' section is currently active and displays the following information:

Session Information			
Session ID:	AU22081900013590	Payment Status:	Free of Payment

Charging Details			
Start Time:	2022-08-19 09:41:46	End Time:	2022-08-19 09:41:57
Reason for stopping:	Local	Duration:	11s
Start SOC:	--	End SOC:	--
Meter start value:	1164.6100	Meter end value:	1164.6100
Energy(kWh):	0.0000		

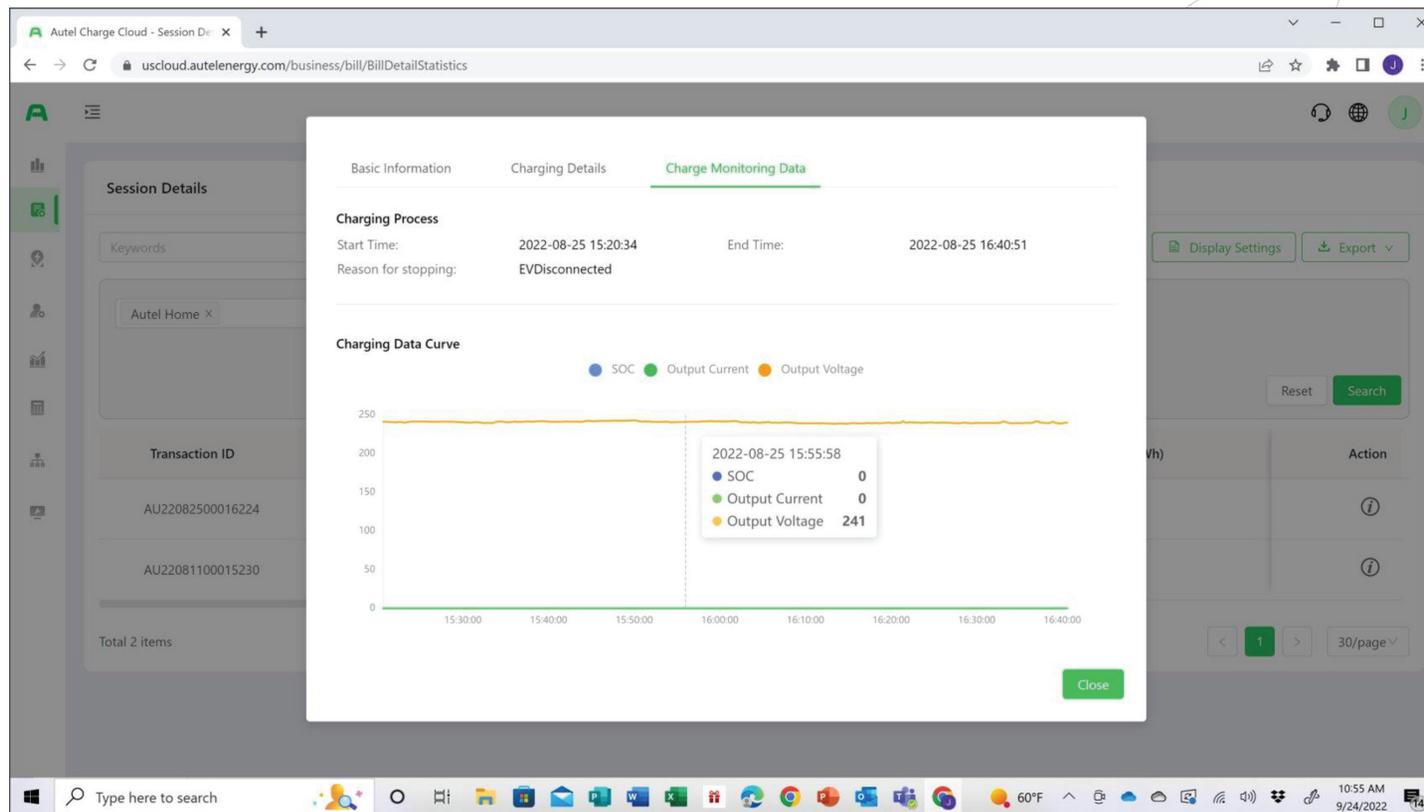
  

Session Details	
Connection Fee:	\$1
Energy Fee:	\$0 - \$0.15/kWh*0 kWh
Time Fee:	\$0.5 - \$0.5/min*1 min
Discount Amount:	\$0 Discount: 0.00% First nullmin Free
Total:	\$0

The interface also includes a sidebar on the left with navigation options, a search bar, and a list of transaction IDs. The bottom of the screen shows a Windows taskbar with various application icons and system information like the time (10:54 AM) and date (9/24/2022).

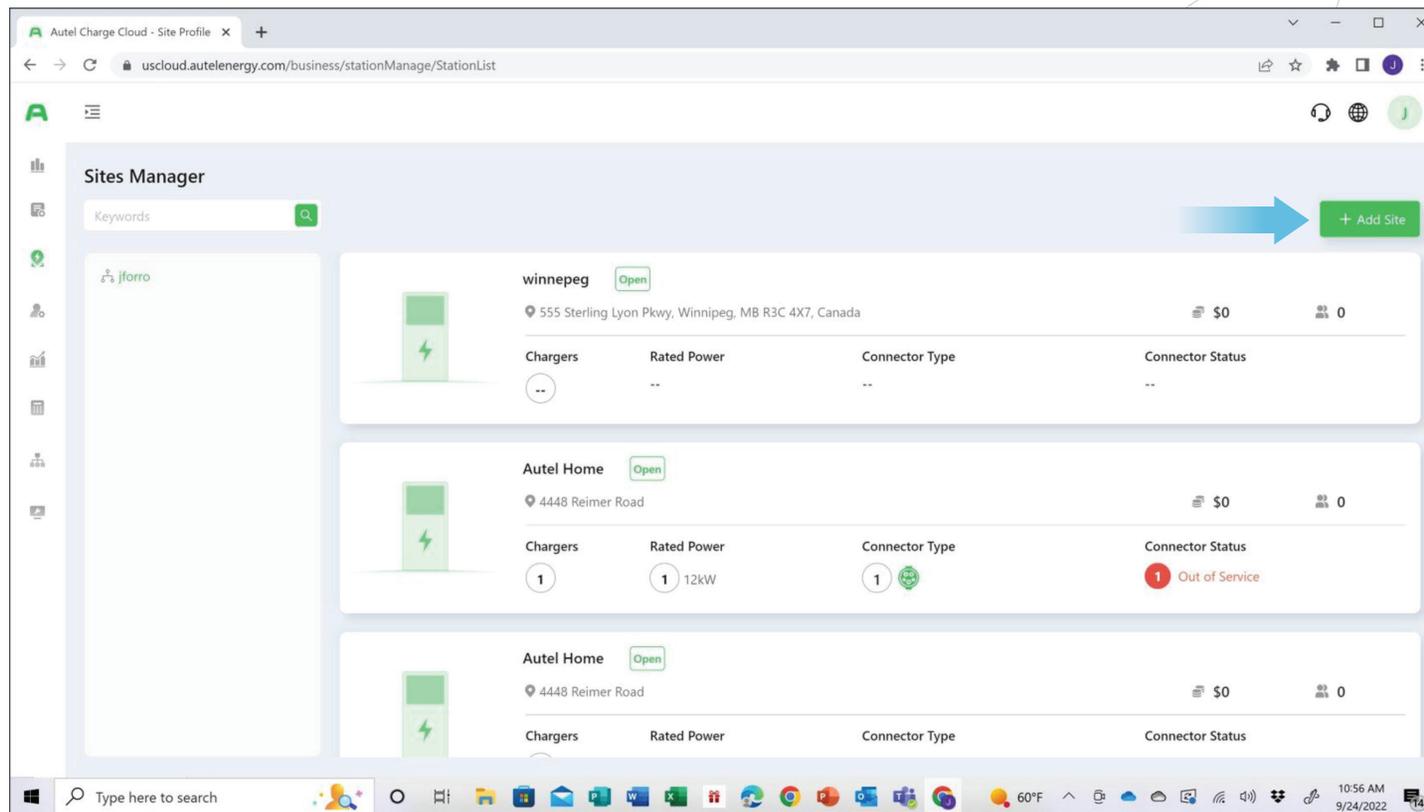
View specific information such as Start-Stop Times, Energy Consumption, Total Fees Charged, Vehicle SoC, and other session related statistics.

# SESSION DETAILS: CHARGE MONITORING DETAILS



The Charge Monitoring Data allows viewing information pertaining to the Battery and the Charger, such as SoC, Output Current, and Output Voltage.

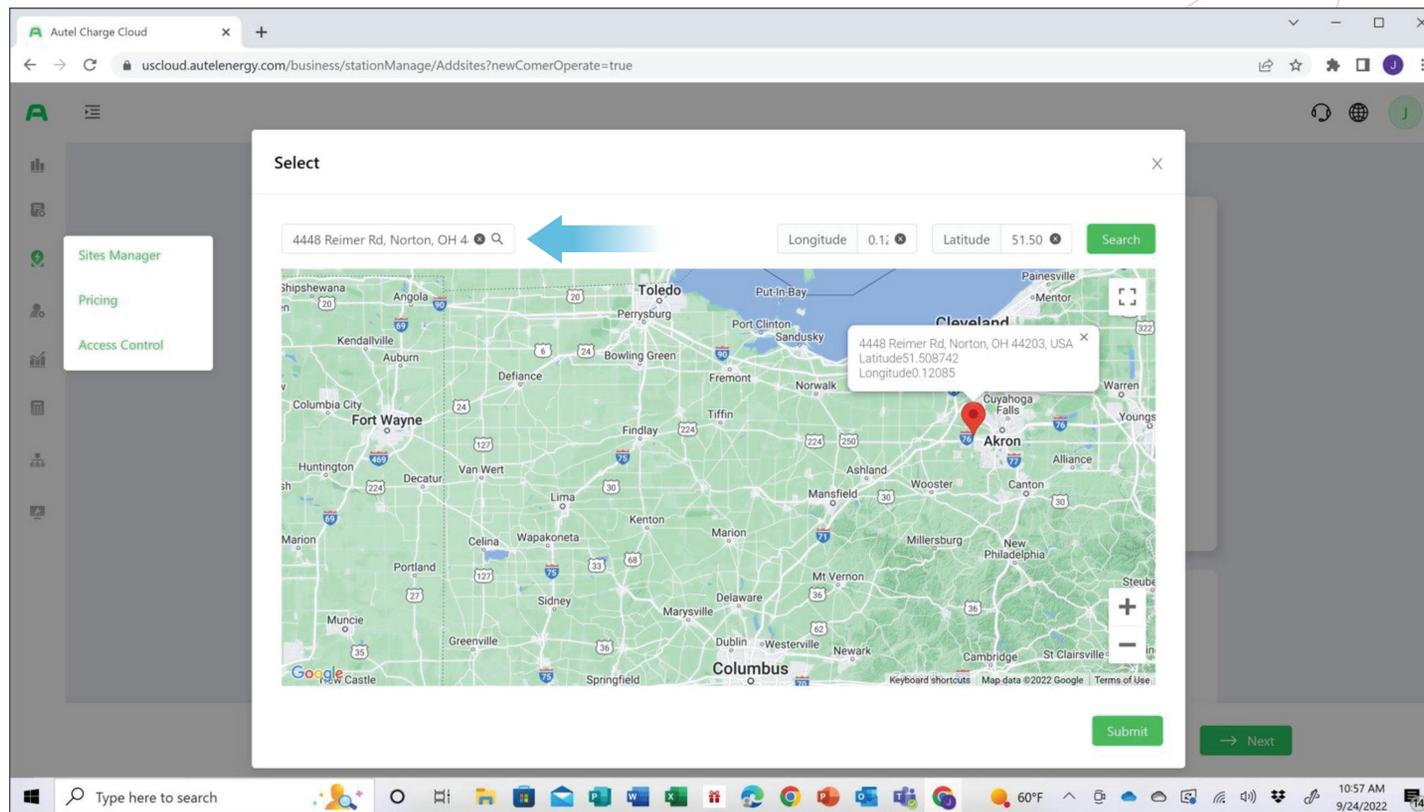
# SITES MANAGER



The Sites Manager section allows you to view all of the specific Charging Sites (Locations) listed within your account.

To add a New Site Location, select the **Add Site** button.

# ADDING A SITE



When adding or creating a site, all boxes with a red asterisk are mandatory such as **Name**, **Location**, etc. If you select the **Green Button**, you can type the address into the box on top of the screen and it will display the map and populate the site information with **Latitude** and **Longitude** data as well.

# CREATING SITE SPECIFICS: BASIC INFORMATION

The screenshot displays the 'Autel Charge Cloud' web application. The browser address bar shows the URL: `uscloud.autelenergy.com/business/stationManage/Addsites?newComerOperate=true`. The interface features a left-hand navigation menu with options: 'Sites Manager', 'Pricing', and 'Access Control'. The main content area is divided into two sections:

- Basic Information:**
  - Site Name:** A text input field containing 'jim'.
  - Location:** A section with a 'Select' button and several input fields. The first row contains 'United States', 'OH', 'Norton', and '-81.6874,41.0551'. The second row contains '2928 Co Hwy 2, Norton, OH', '2928', and a dropdown menu. The dropdown menu is open, showing a list of countries and their international dialing codes: Marshall Islands (+692), Mayotte (+269), Mauritius (+230), Mauritania (+222), United States (+1) (highlighted), American Samoa (+1-684), Virgin Islands, US (+1340), and Mongolia (+976). Below the list is a search input with '86' and a label 'Enter phone number'.
  - Organization:** A dropdown menu with 'jforro' selected.
- Open Information:**
  - Open Date:** A date picker set to '2022-09-24'.
  - Do not display on App

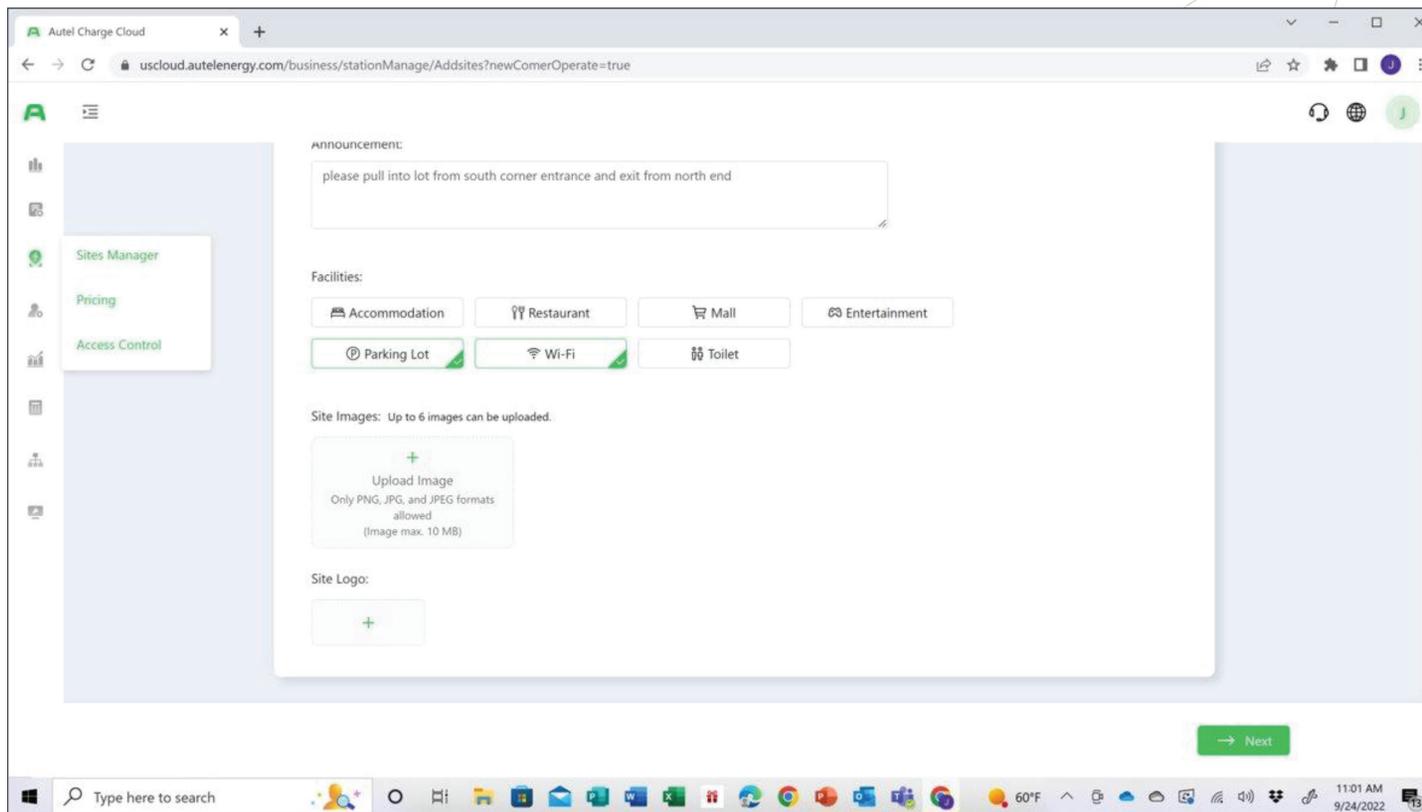
A green 'Next' button is located at the bottom right of the form area. The Windows taskbar at the bottom shows the search bar, system tray with weather (60°F) and date (9/24/2022), and various application icons.

Site details, such as the Hours of Operation will be setup here.

This is done under the **Open Information** section.

**Emergency Contact** information of the Site Manager must also be set up at this time. This is the person who will receive notifications from drivers who raise any concerns about your charging stations.

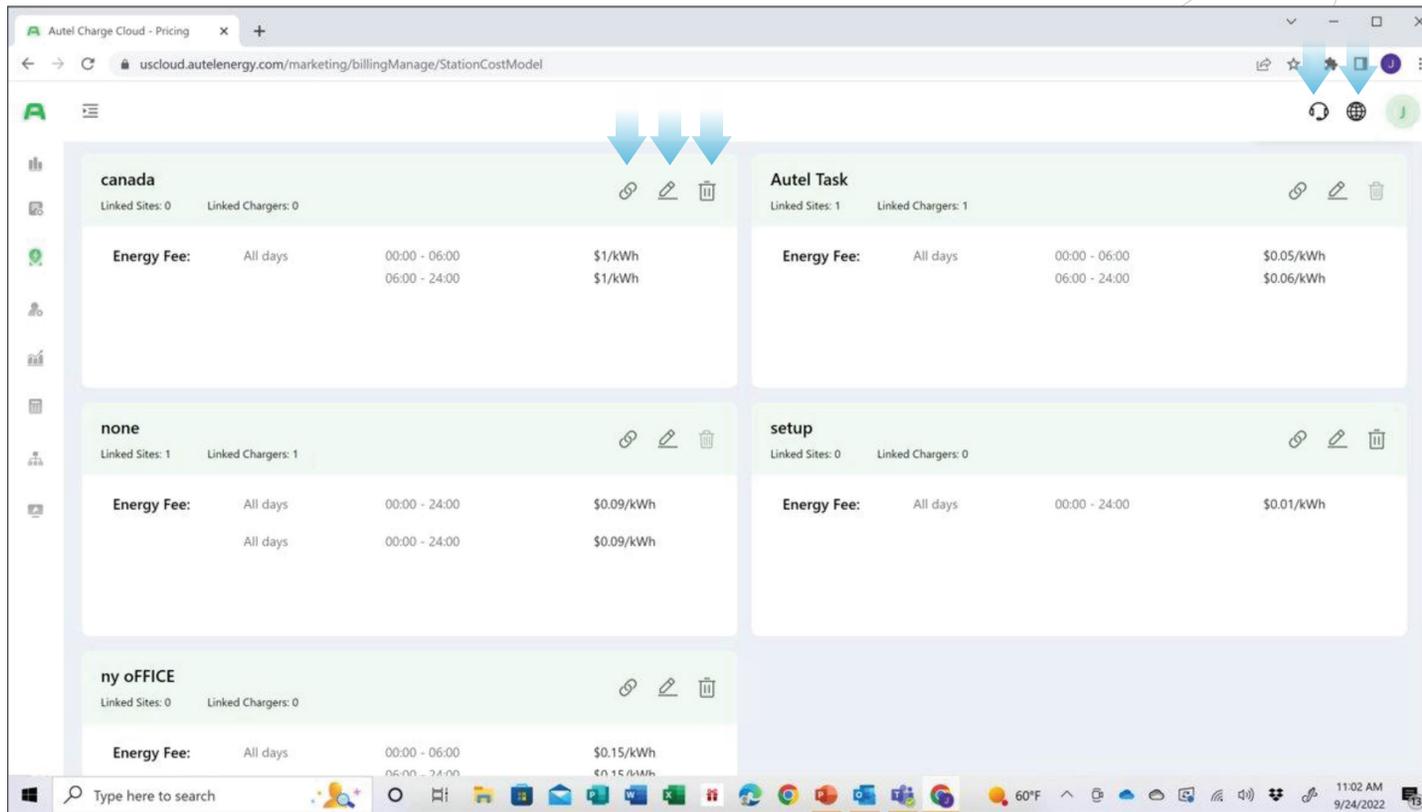
# CONFIGURING THE SITE



Specific information regarding this site can be added in the **Announcements** and **Facilities** sections. Information like the type of property the site is located at and images

can be applied to make the site easier for the end user to find. In the **Announcements** section one can leave special directions for the end user or even special advertising.

# PRICING RULES CREATED



Selecting **Pricing Rules** will allow you to view the rules currently created.

Edit existing rules by selecting the pencil icon.

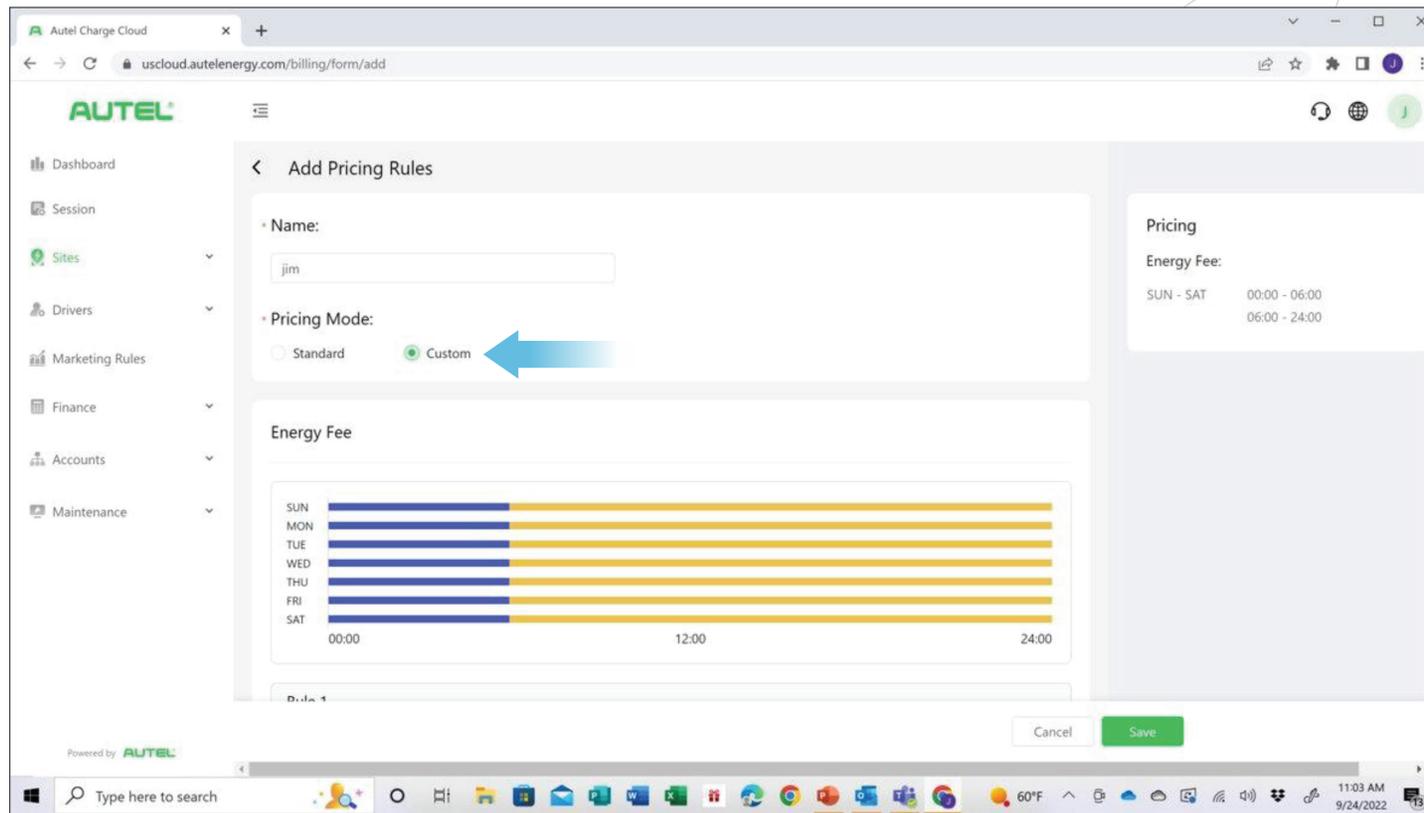
Deleting rules can be done by selecting the trash can icon.

Click the "Link" icon to pair a created rule with a specific site.

Click the Support icon if any assistance is needed during the setup.

Click the "Globe" icon to change the language within the dashboard.

# ADD PRICING RULES

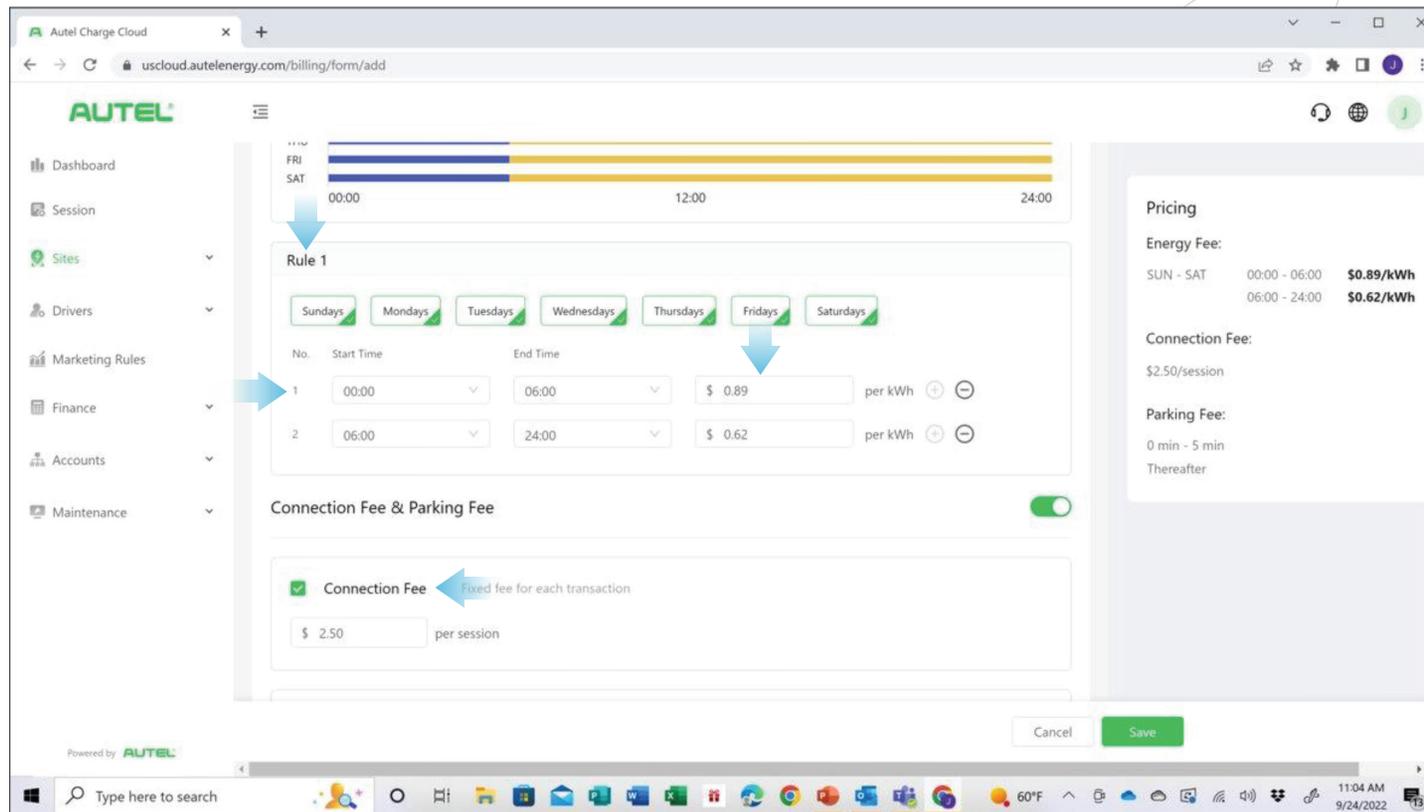


Select **Add a New Rule** to set up a new pricing rule.

All required fields must be filled out.

Selecting a **Custom** Pricing Mode allows you to setup different pricing for different days of the week and for different types of charges collected.

# kWh FEES & TIMES



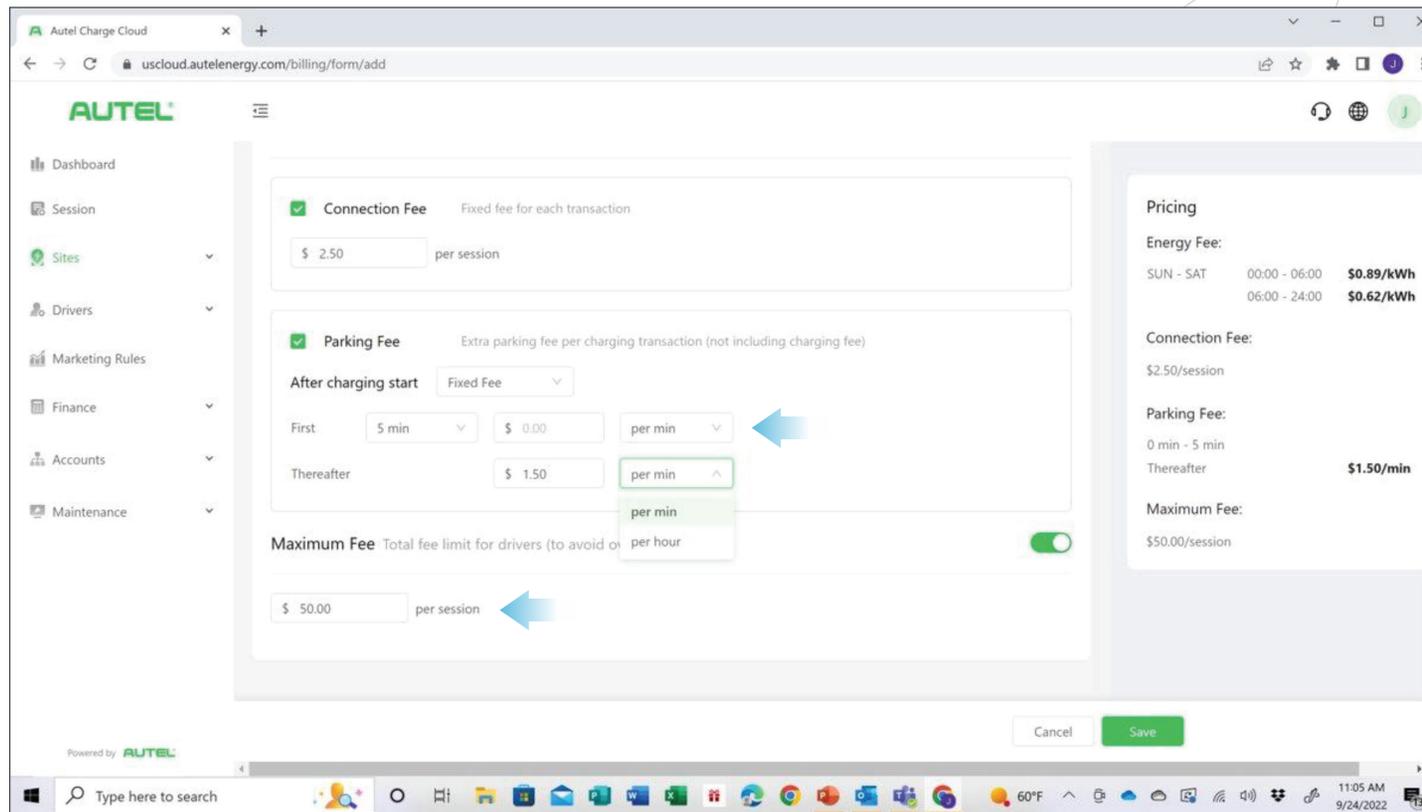
## RULE:

Days of weeks that the rule will apply are highlighted in green. To select or deselect, simply click on the day of the week.

Selecting the **Start Time** and the **End Time** that the pricing rule will be applied, manipulate the time accordingly and select the pricing fees for **Per kWh** charges. To add a value less than a dollar, one must place a "0" in front of the cent value.

To apply a **Connection** or **Park** fee (time), select the button and fill in the pricing values.

# CONNECTION FEES & PARKING FEES



**Parking Fee** can be used instead of kWh Fees or in addition to kWh Fees.

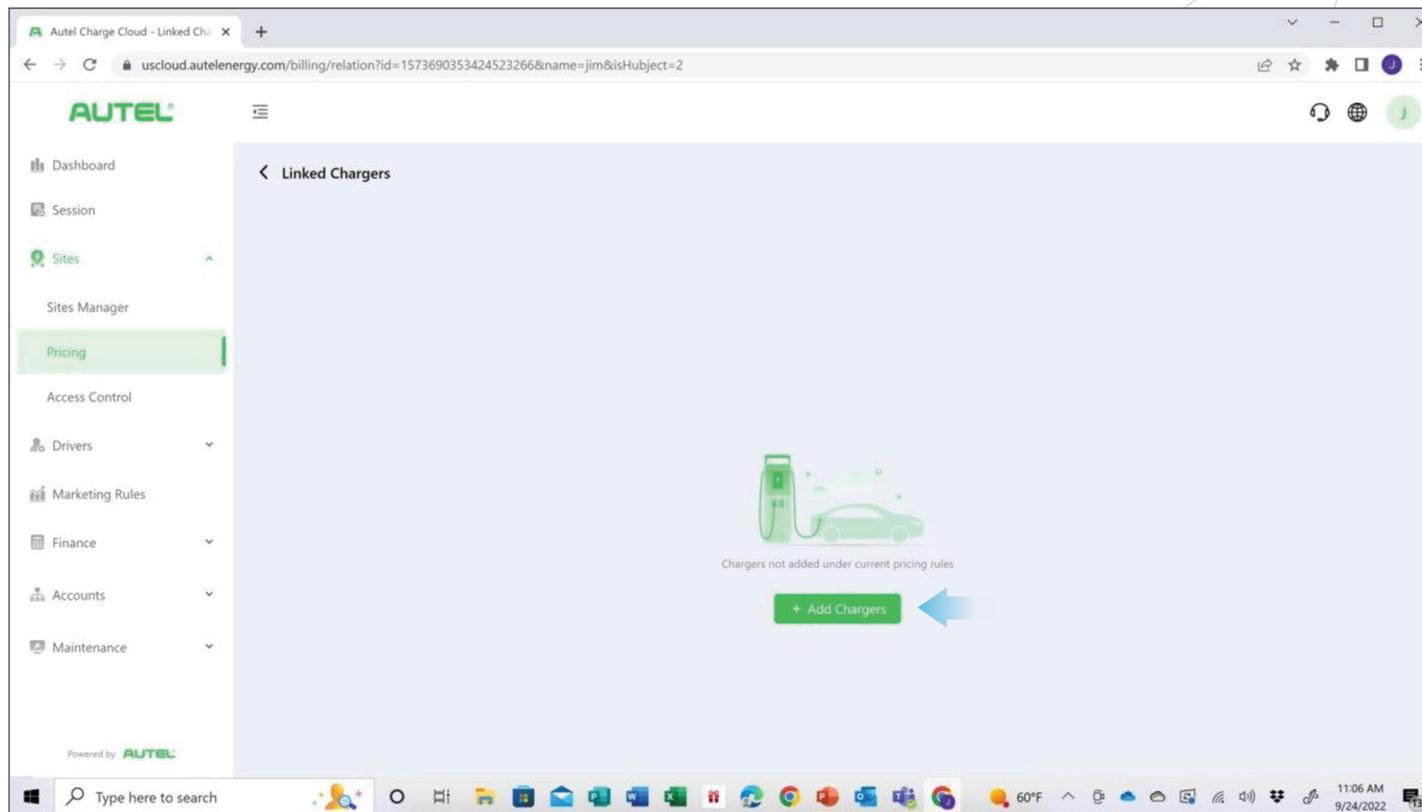
These can be set up to secure funds if someone is parked after the charge has finished.

A **Maximum Fee** can be created to limit the total POS charge that the customer will receive.

\*Other than a potential advertising screen type of revenue, these fees just explained are how YOU will make money. You are in

control of these fees and they will appear on the screen of your commercial chargers so the customer is made aware of your fee structure before they utilize the use of your EVSE equipment\*

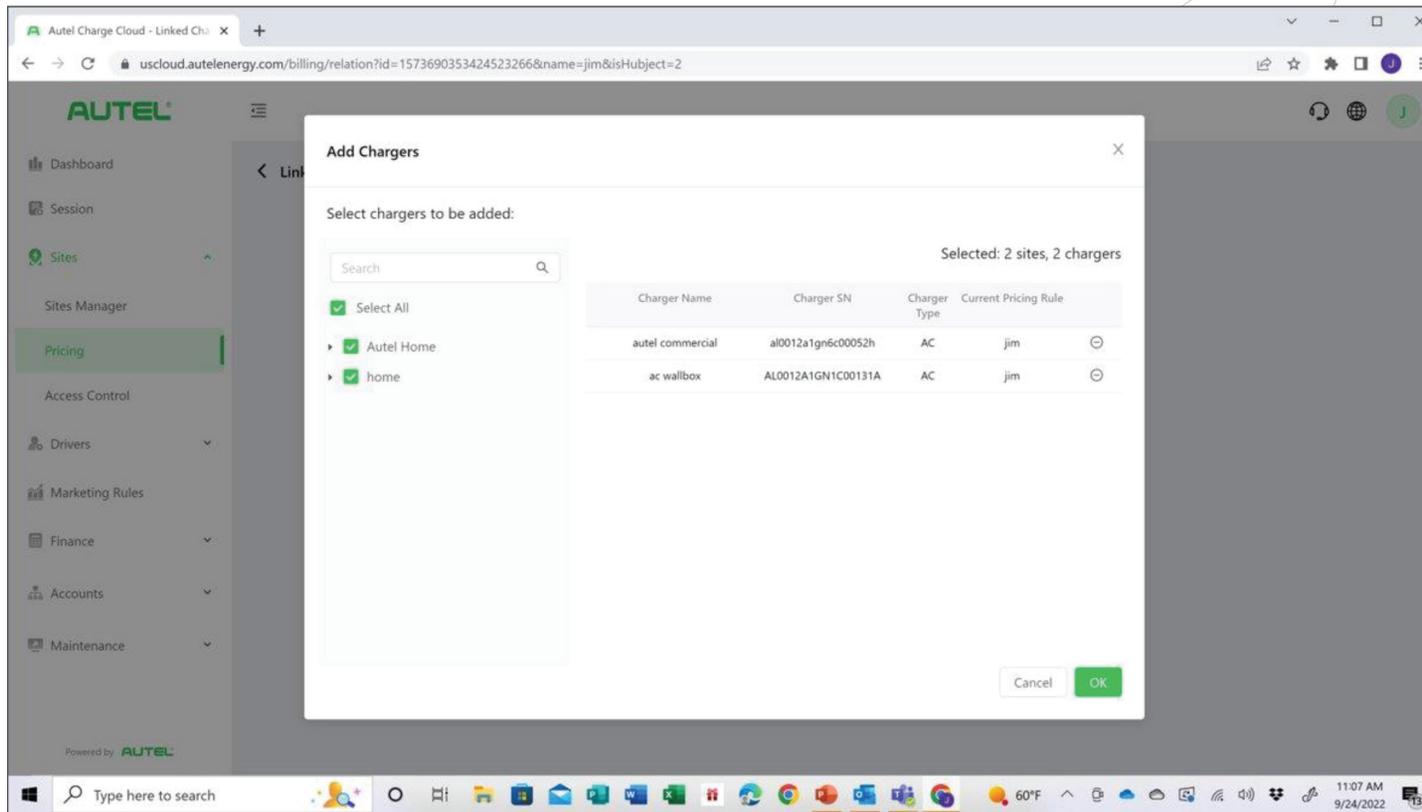
# LINKED CHARGER(S)



After the site and pricing rules have been created, one will have to link a charger with them.

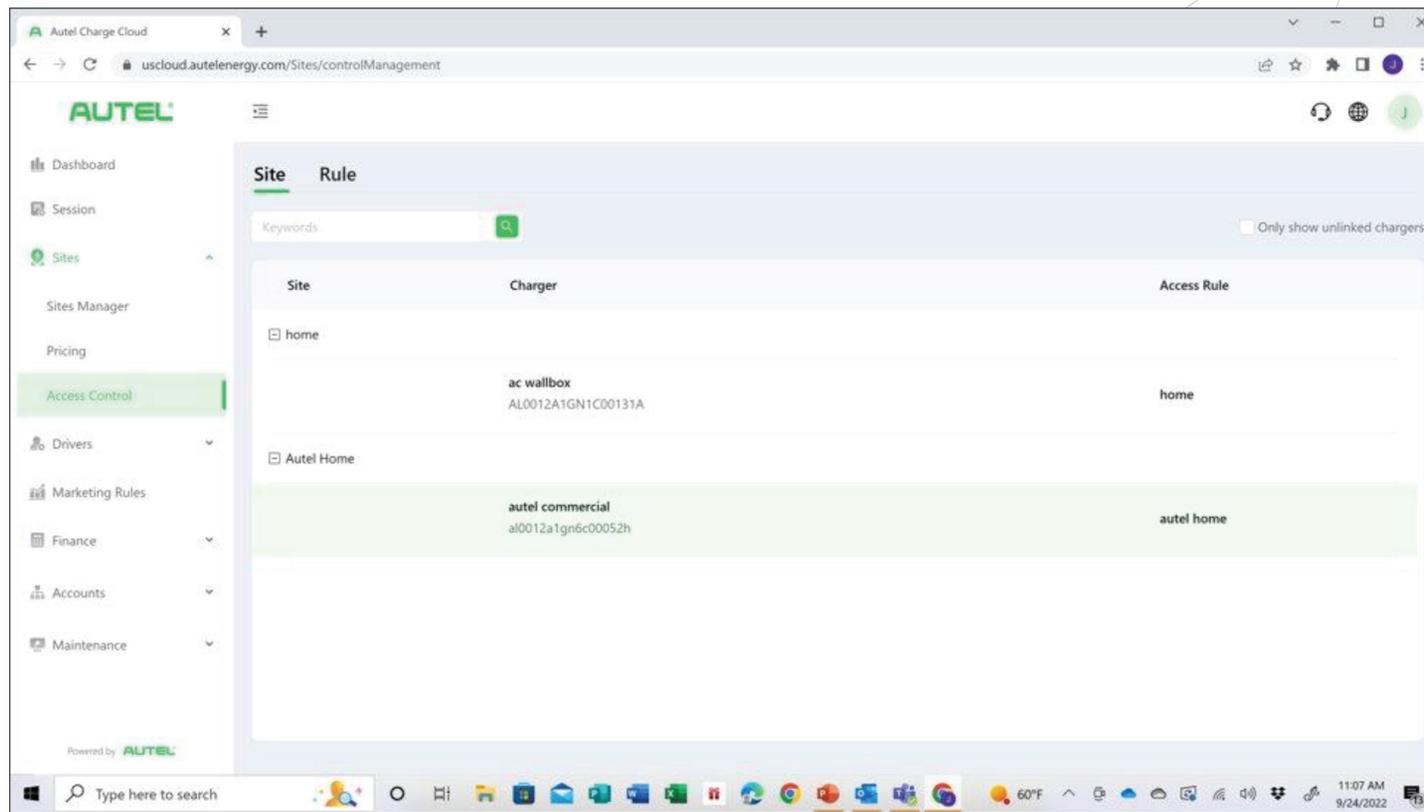
Select: **Add Chargers**

# ADDING CHARGER TO PRICING RULE(S)



Select the Charger and the Site to be linked and hit **OK**.

# ACCESS CONTROL – SITE

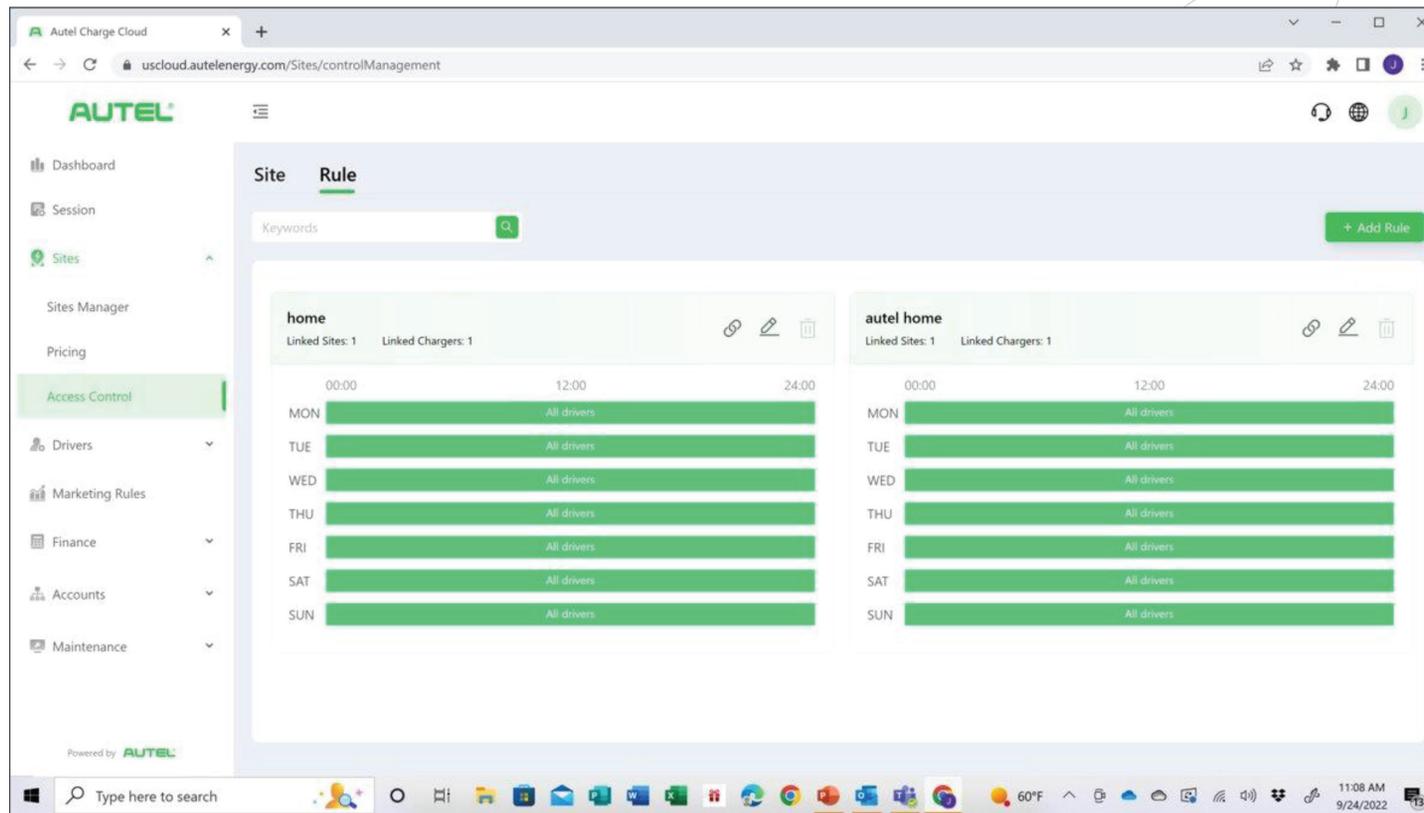


**Access Control** allows one to see their Sites.

Select a specific Site to view the Rules associated with it.

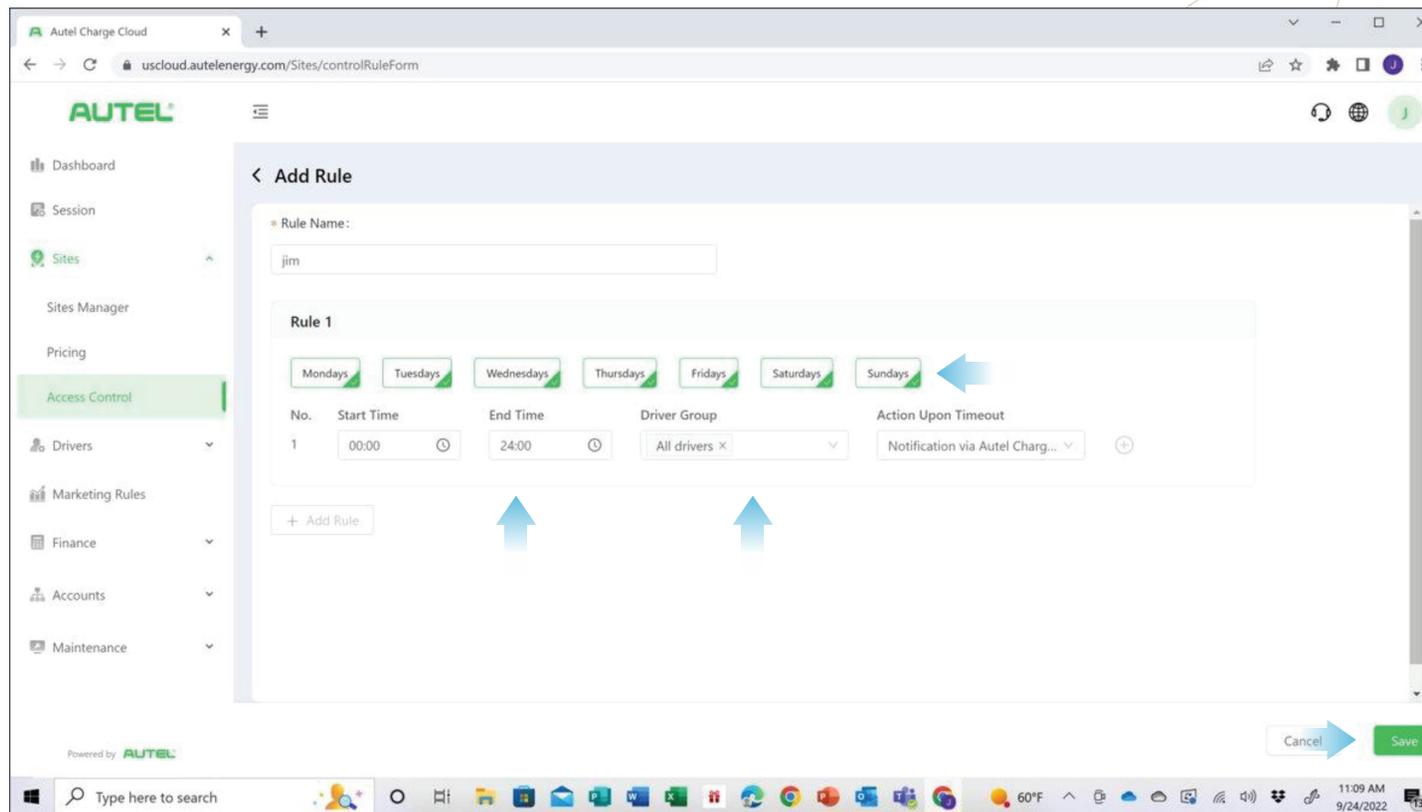
In the later part of this feature, one can control who and when they can access the Sites. This is great for Fleet Accounts and their specific drivers.

# ACCESS CONTROL – RULE



One can either edit an existing Rule or create a new one by selecting the **Add Rule** button.

# ADJUSTING ACCESS CONTROL RULES

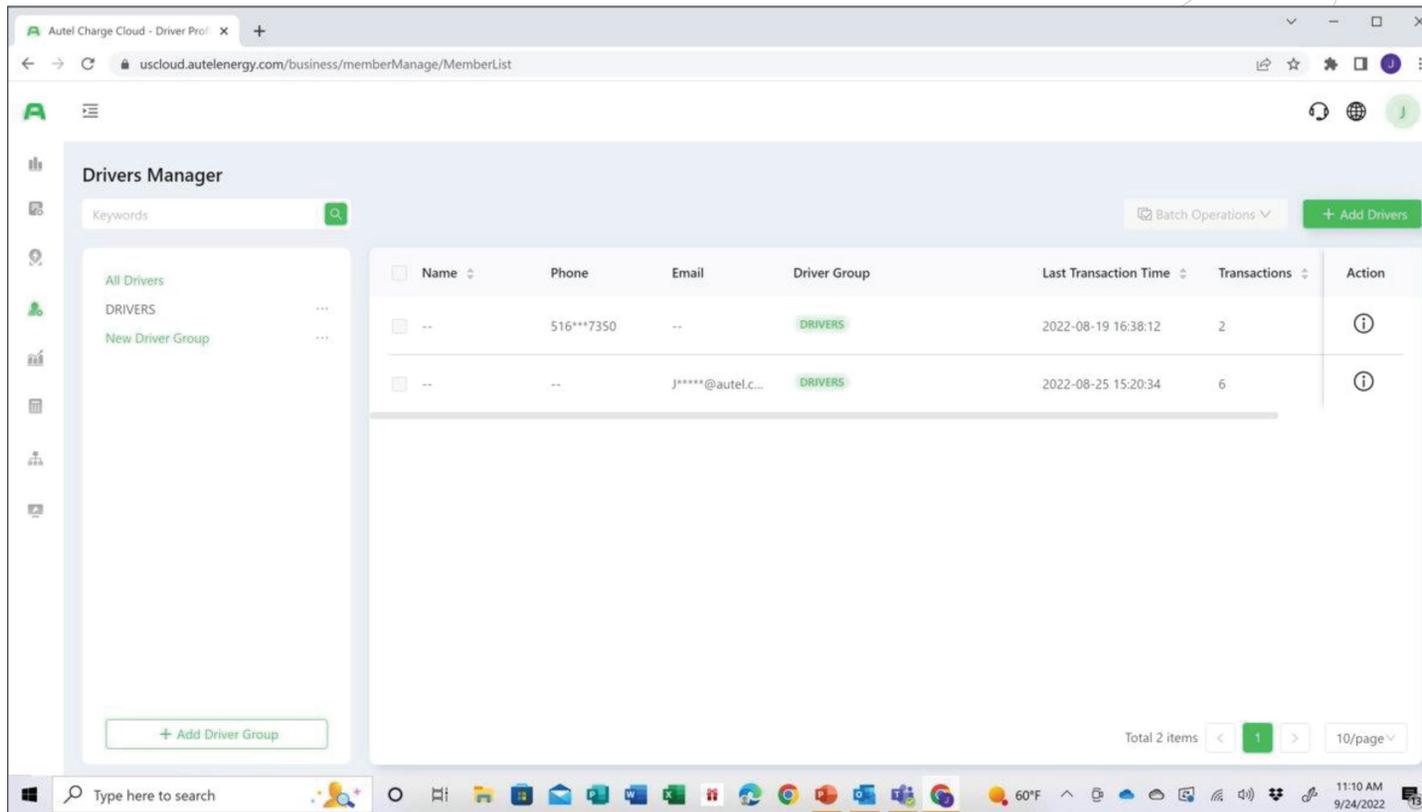


Name the Rule in the **Rule Name** section.

Select the days that the Rule will apply, the specific **Driver Group** and the **Start Time** and **End Time** to allow access to the Site's chargers.

**Save** changes.

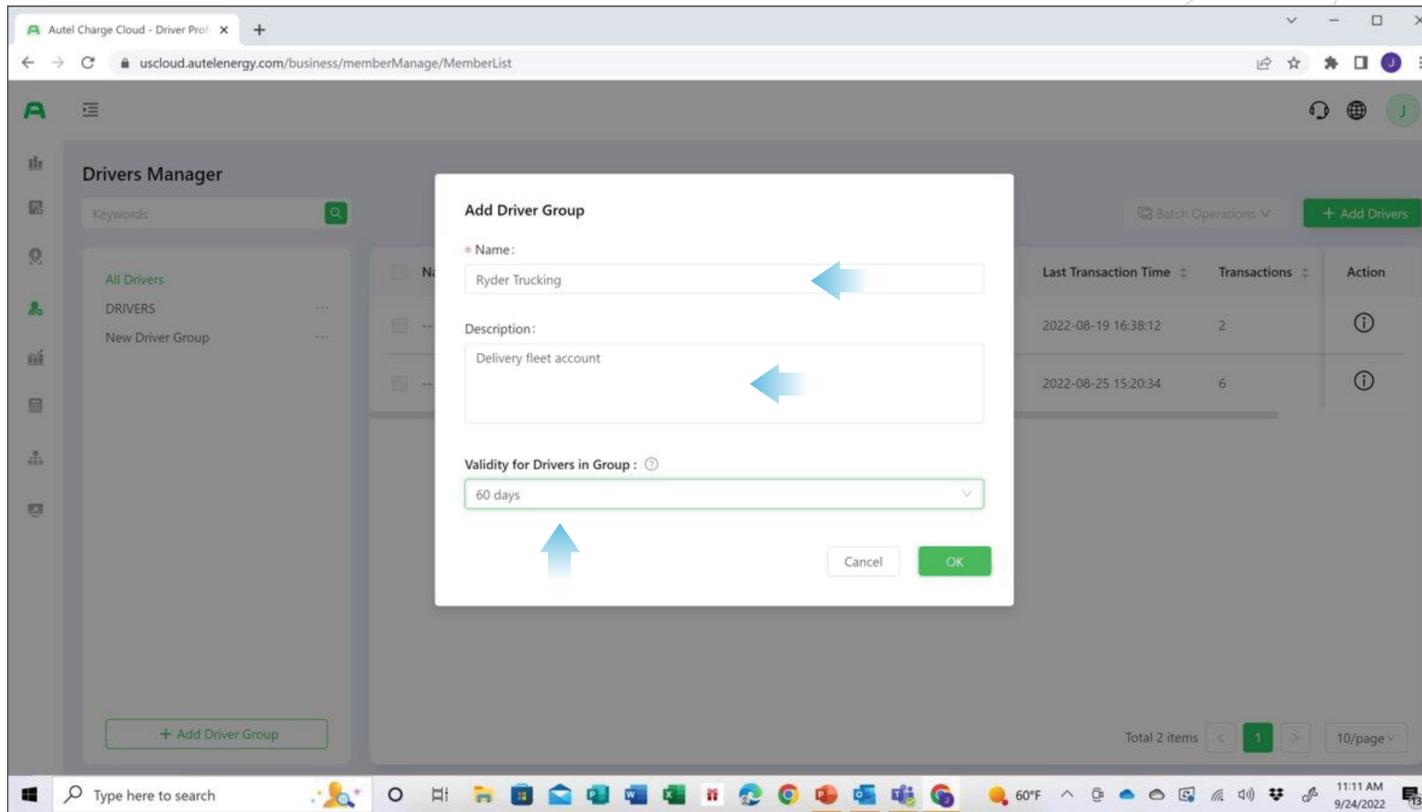
# DRIVERS



The Driver's section allows you to view specific information pertaining to Drivers and Groups.

One can also create New Drivers or Groups from this section. By selecting **Add Drivers**.

# ADDING DRIVER GROUP



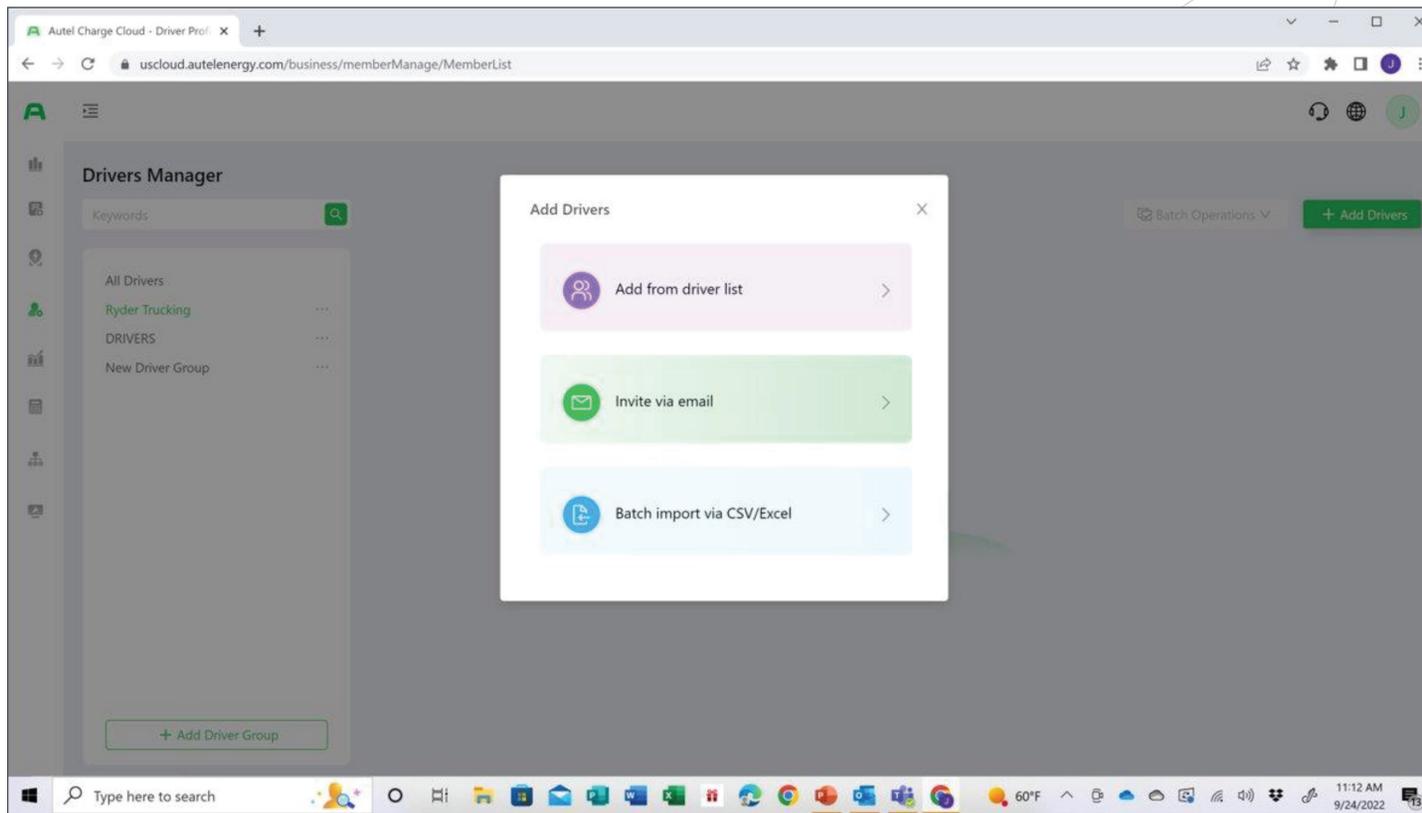
Add new drivers or groups by selecting add new drivers.

\*Driver groups could be used for fleet accounts/employees etc.\*

Name the group-describe the group type under the **Description** menu-and finally select how long of a duration this will apply for under the **Validity for Drivers In Group** section.

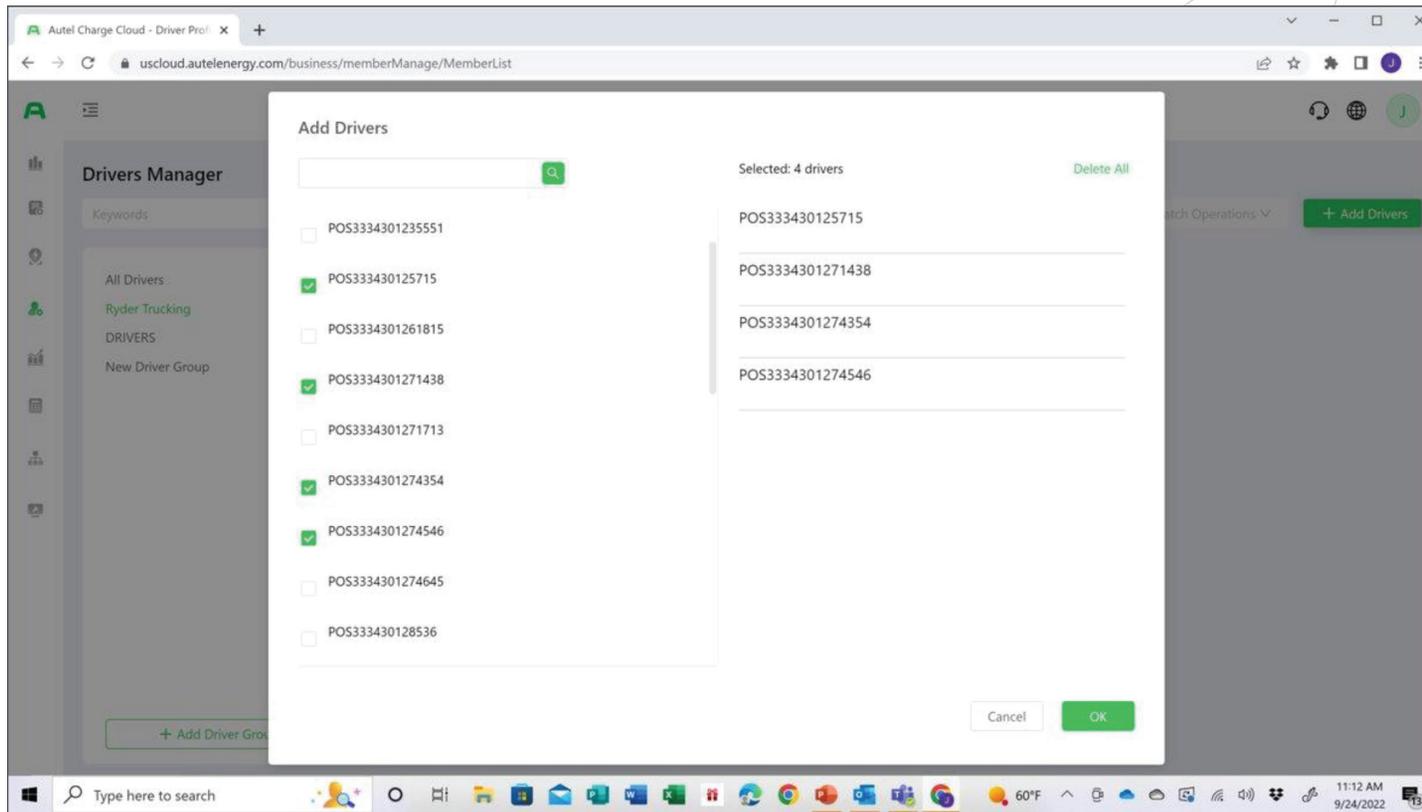
Select: **OK**

# ADD DRIVERS



Once a driver group is created one can  
**Add from driver list, Invite via email or  
Batch import via CSV/Excel.**

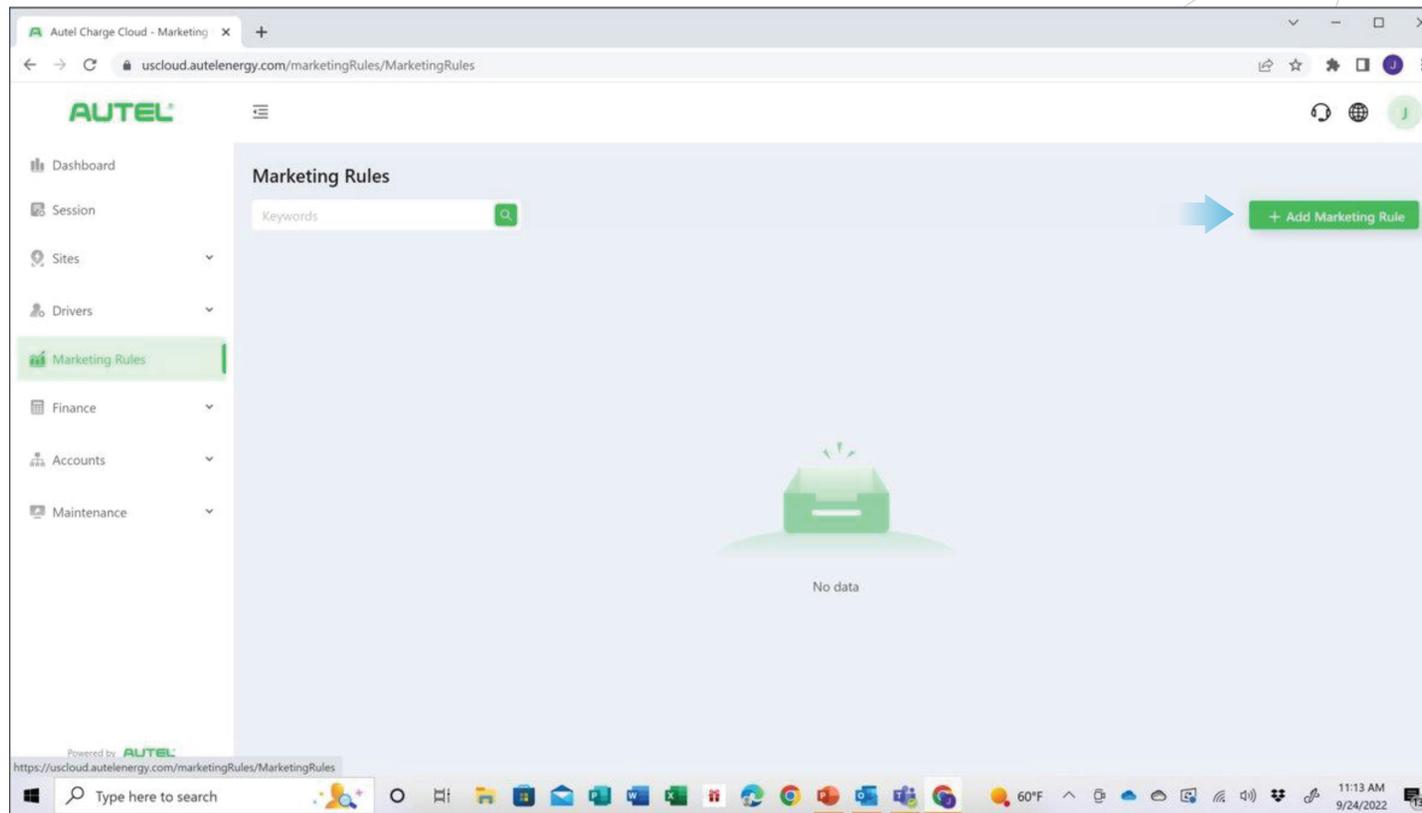
# ADD DRIVERS



To add drivers manually, select the boxes next to the list of drivers to assign them to that group created.

Select: **OK**

# MARKETING RULES



A site host can create a special discount for driver groups in this section.

Create a new rule by selecting **Add Marketing Rule**

# ADD MARKETING RULE

The screenshot shows the 'Add Marketing Rule' form in the Autel Charge Cloud interface. The form is titled 'Add Marketing Rule' and contains several sections:

- Rule Name:** A text input field.
- Description:** A larger text area for providing details.
- Rule:** Radio buttons for 'Discount' (selected) and 'Partial discount'. The 'Discount' option includes a 'Total transaction amount' range of '0 - 100%' and a 'Discount' label. The 'Partial discount' option includes a 'Start charging' dropdown set to '5 min' and a 'Free' label.
- Validity:** Radio buttons for 'Always valid' (selected) and 'Validity'. The 'Validity' option includes 'Start time' and 'End time' date pickers.
- Apply to Driver Group:** A text input field.

At the bottom right of the form are 'Cancel' and 'Submit' buttons. A green '+ Add Marketing Rule' button is visible in the top right of the main content area. Blue arrows point to the 'Rule Name', 'Description', 'Discount' radio button, 'Always valid' radio button, 'End time' date picker, and 'Apply to Driver Group' input field.

Name the rule under **Rule Name**

Provide a short **Description** like  
"fleet account discount"

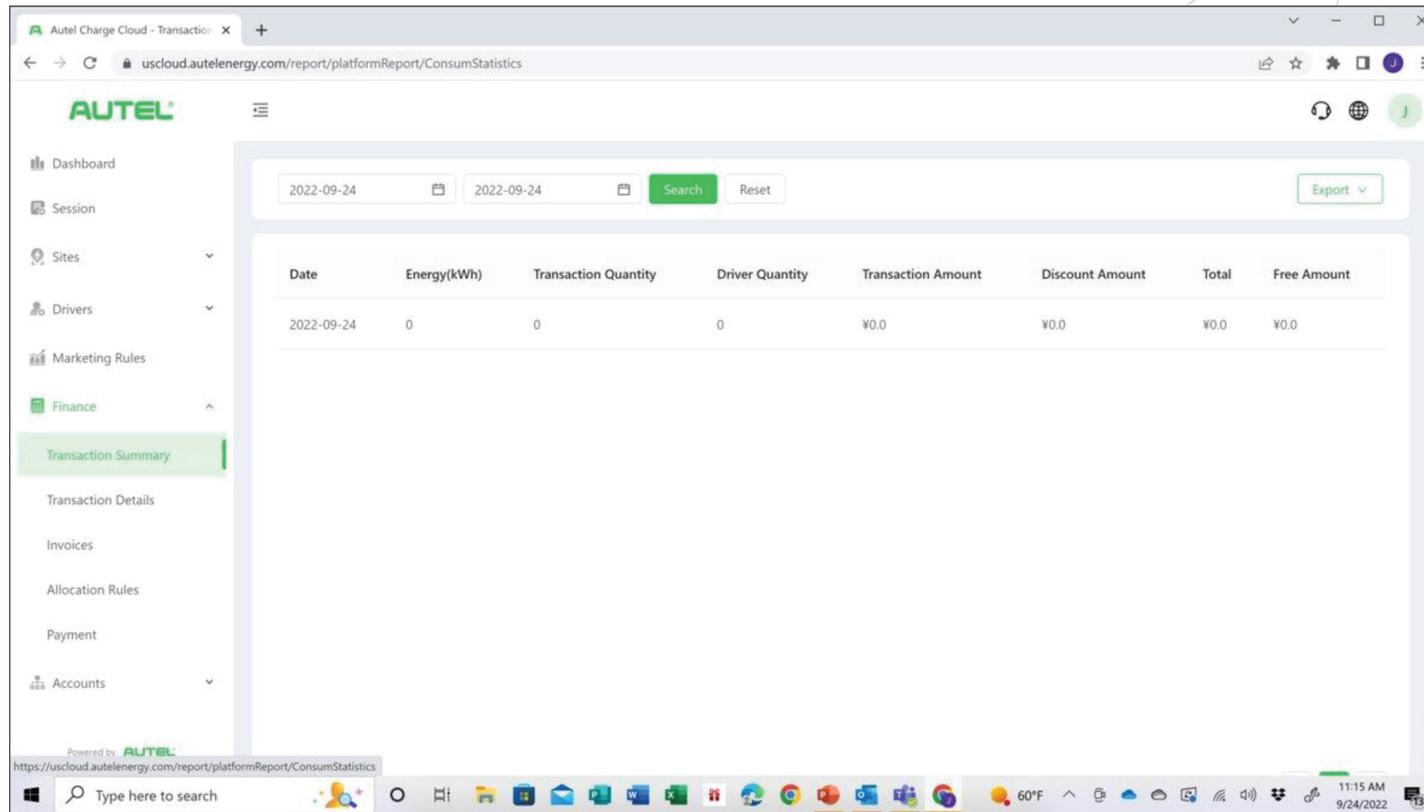
Create either a total or partial discount  
structure under the **Rule** section.

Choose when the discount will  
apply under the **Validity** section.

Select : **Apply to Driver Group**

Select: **Submit**

# TRANSACTION SUMMARY

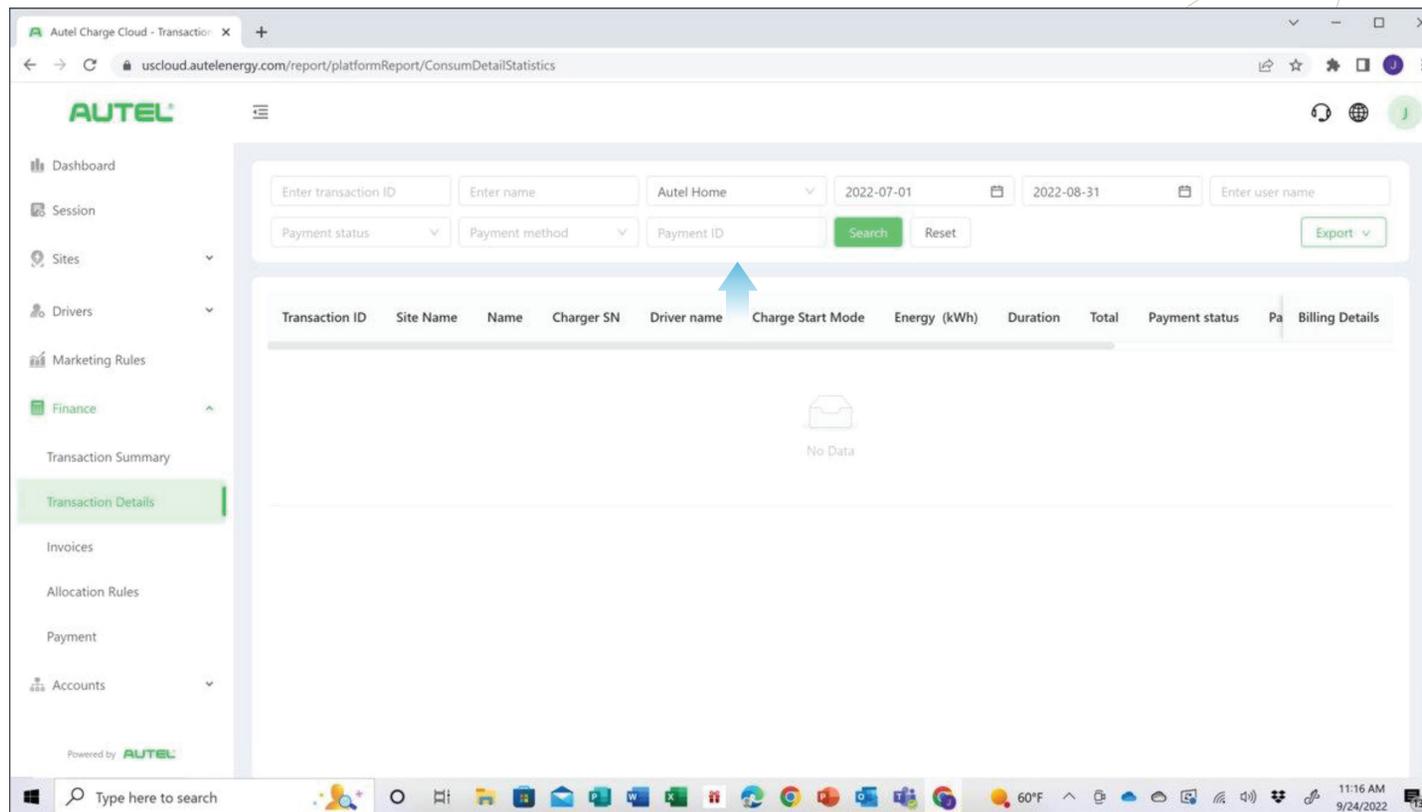


Transaction summary allows one to view specifics about various transactions occurring at sites by dates.

Select the date range at top of screen to narrow search of transactions.

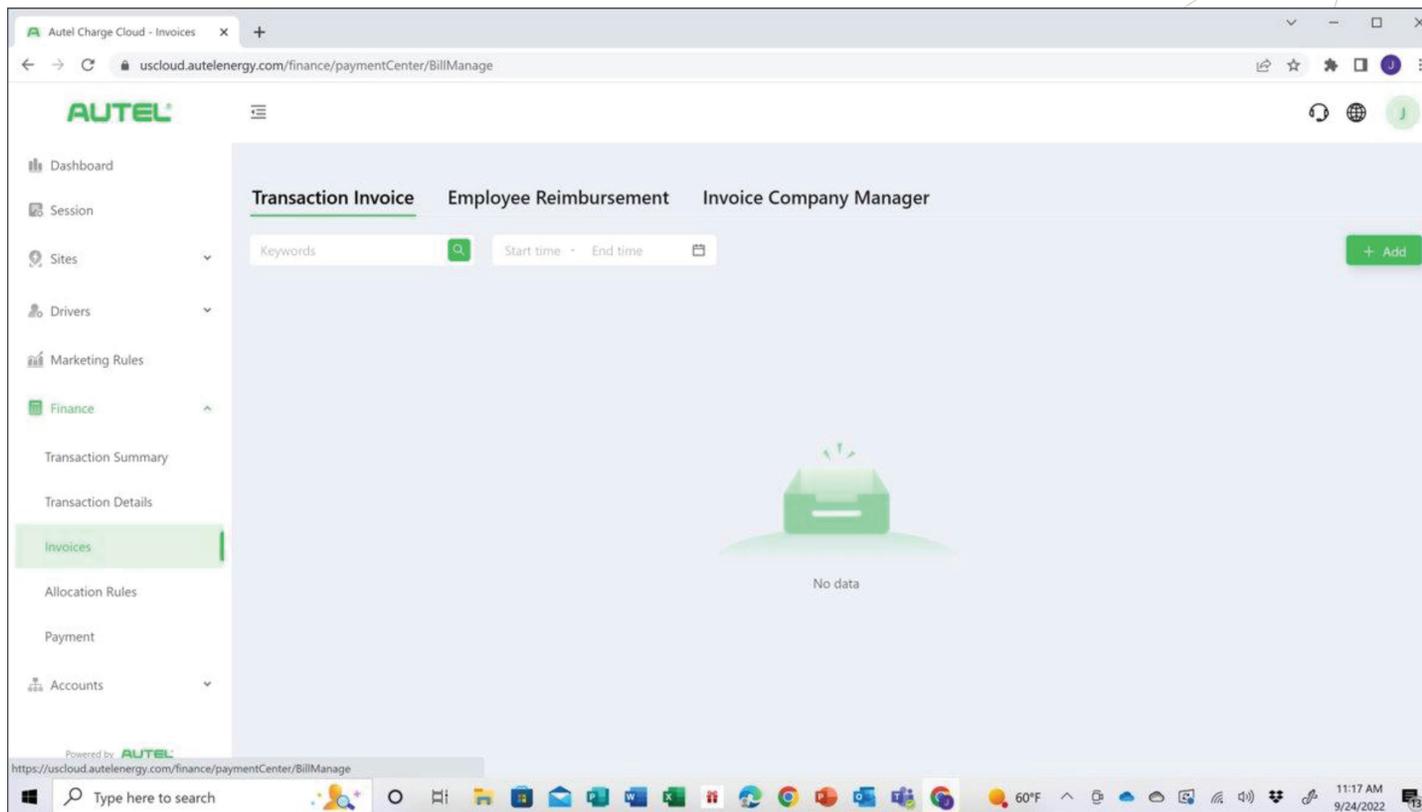
Double clicking on a specific transaction pulls it up for detailed viewing.

# TRANSACTION DETAILS



To select a specific detailed view of a transaction, fill out the boxes located at the top of the screen and hit **Search**

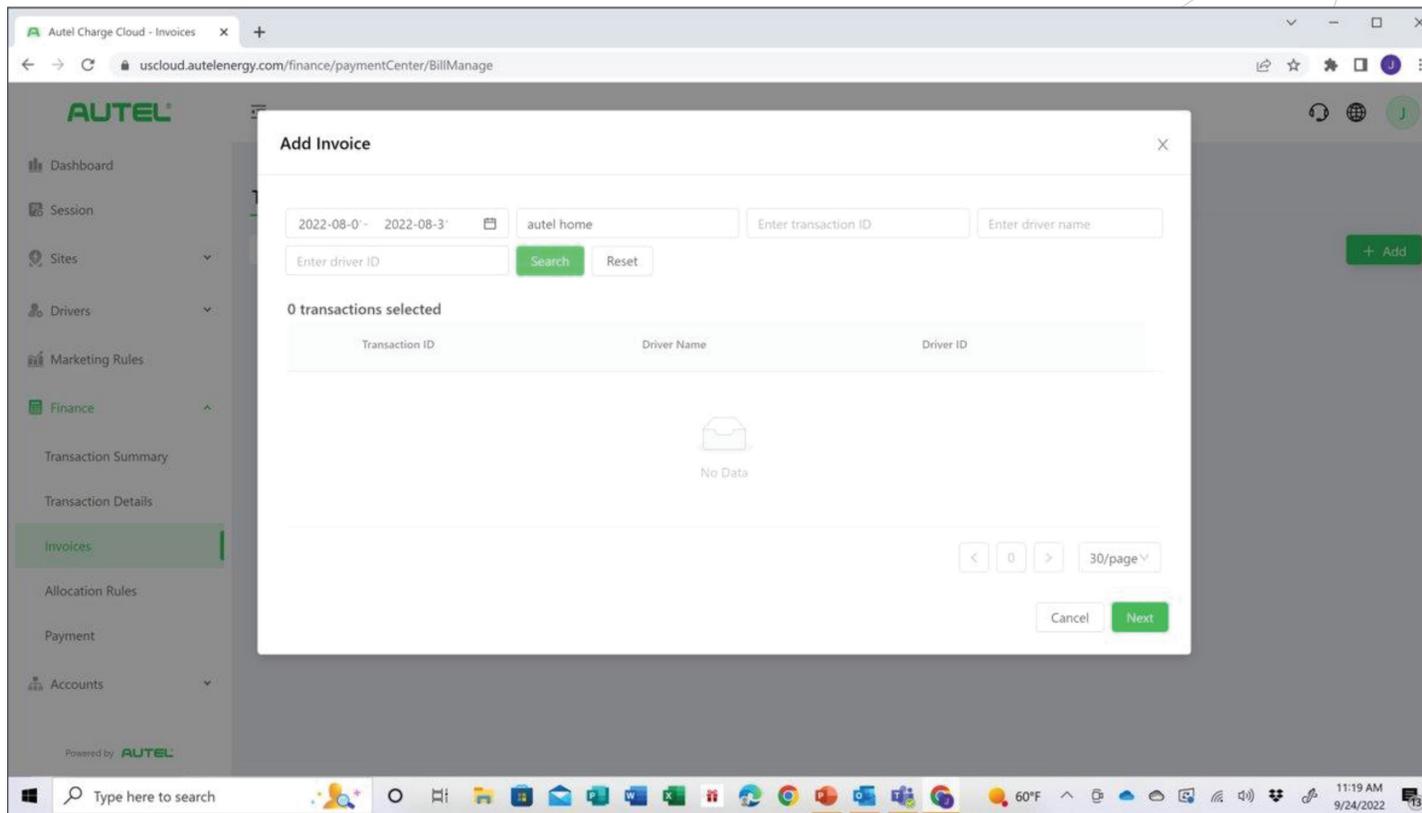
# INVOICES



The invoices section allows one to create invoices, view invoices, and set up employee discounts.

Start by selecting the **Add** button.

# ADD INVOICE

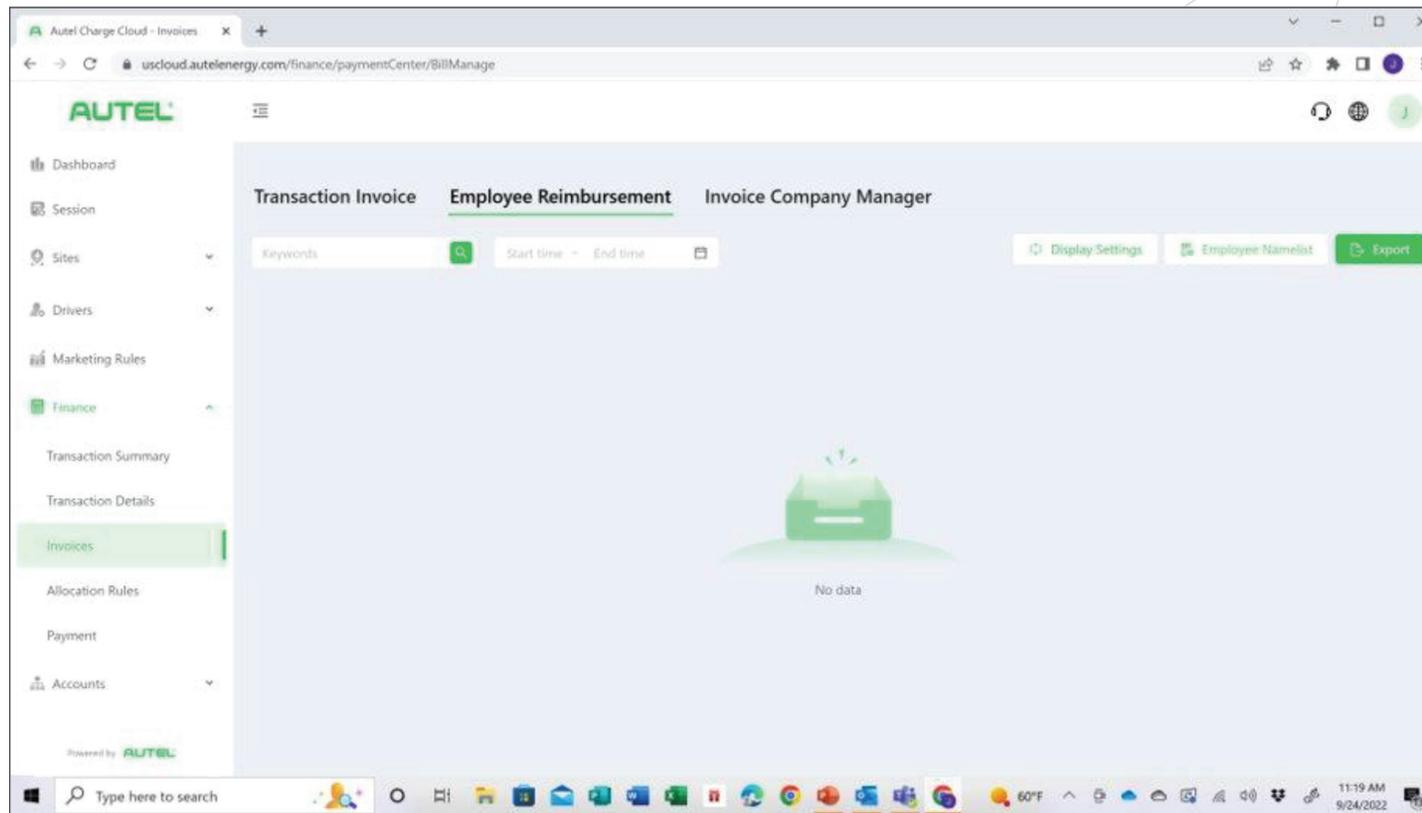


Fill in the boxes at top of the screen to select the sessions to be added to the invoice being created.

Select the sessions to be added to the invoice and then select **Next**

After boxes at top of screen have been populated select **Search**

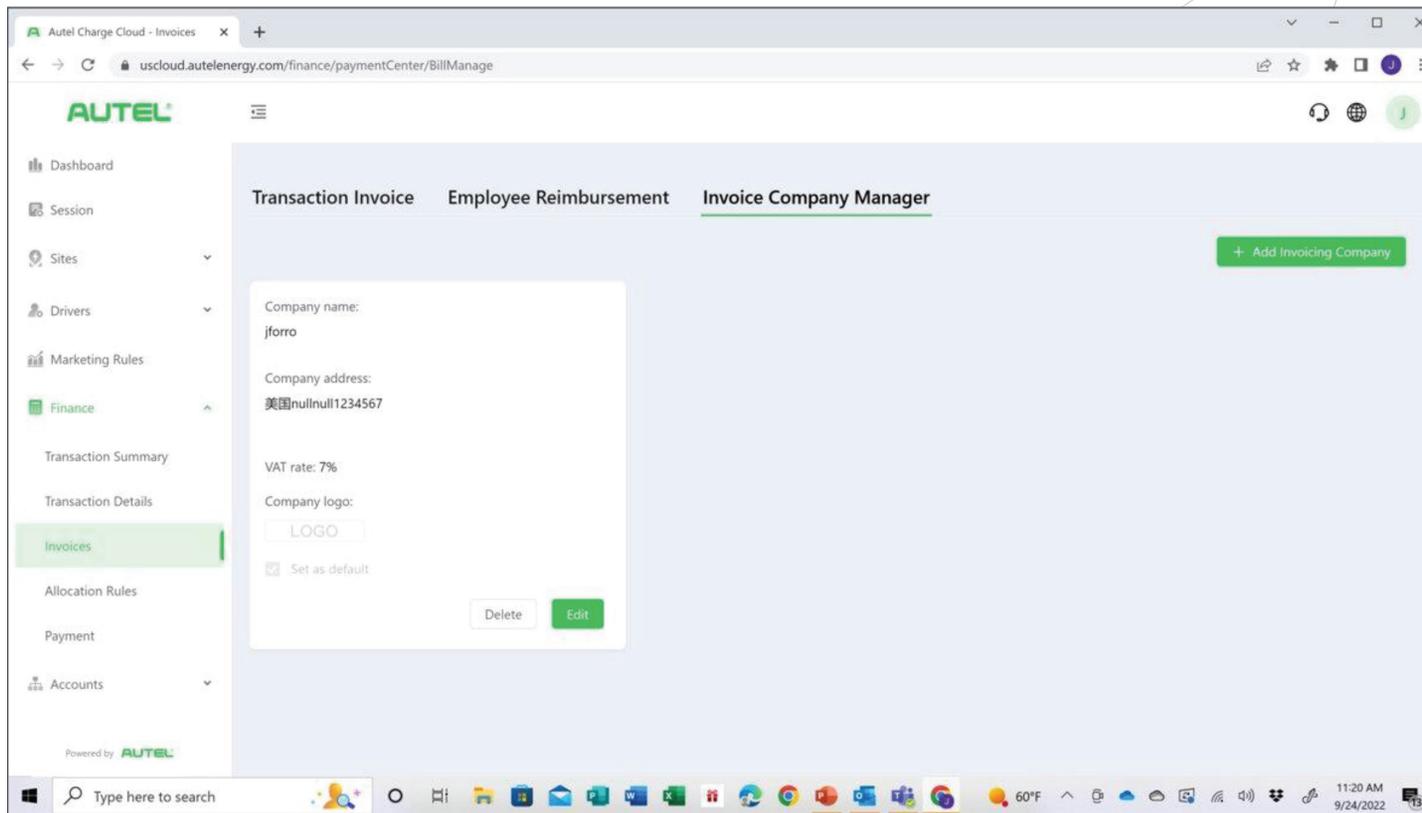
# EMPLOYEE REIMBURSEMENT



**Import** employees from list.

One can use this for applying a discount of sorts for the employees of the site's organization. You are in control of the discount amount.

# INVOICE COMPANY MANAGER

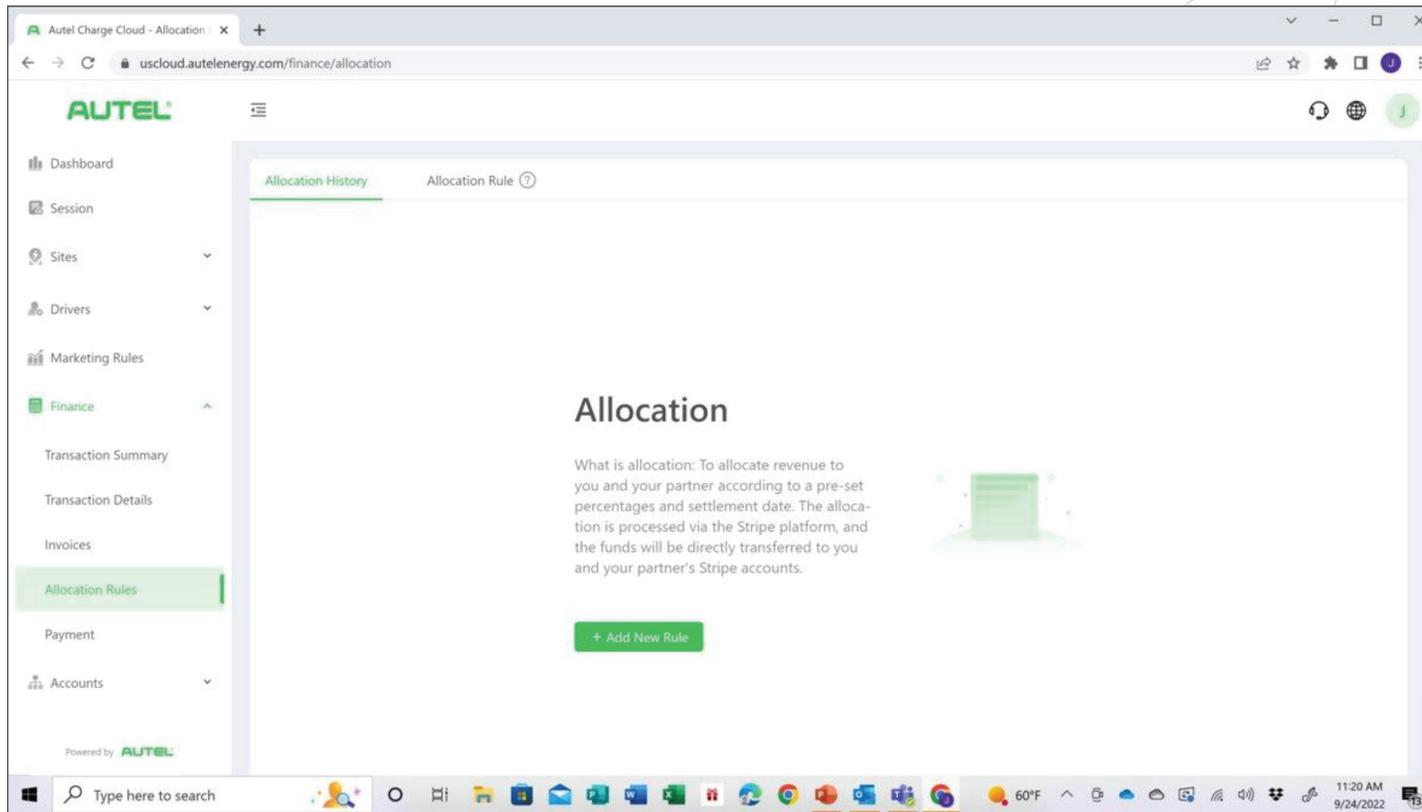


Set up specific company information to be applied to the invoice being created by selecting **Add Invoicing Company**

Company basic information as well as, a company logo should be added for a professional-looking invoice being given to the customer.

One can edit current company by selecting the **Edit** button

# ALLOCATION



Allocation means revenue sharing between multiple business partners running this site.

# ADD ALLOCATION RULE

**Add Allocation Rule**

\* Rule Name  
Jim

\* Settlement Date  
T+0

\* Receivers  
jforro

\* Allocation Percentage  
55.00%

Select partner name

45.00%

Receivers cannot be null.

\* Validity

2022-09-24 - End time

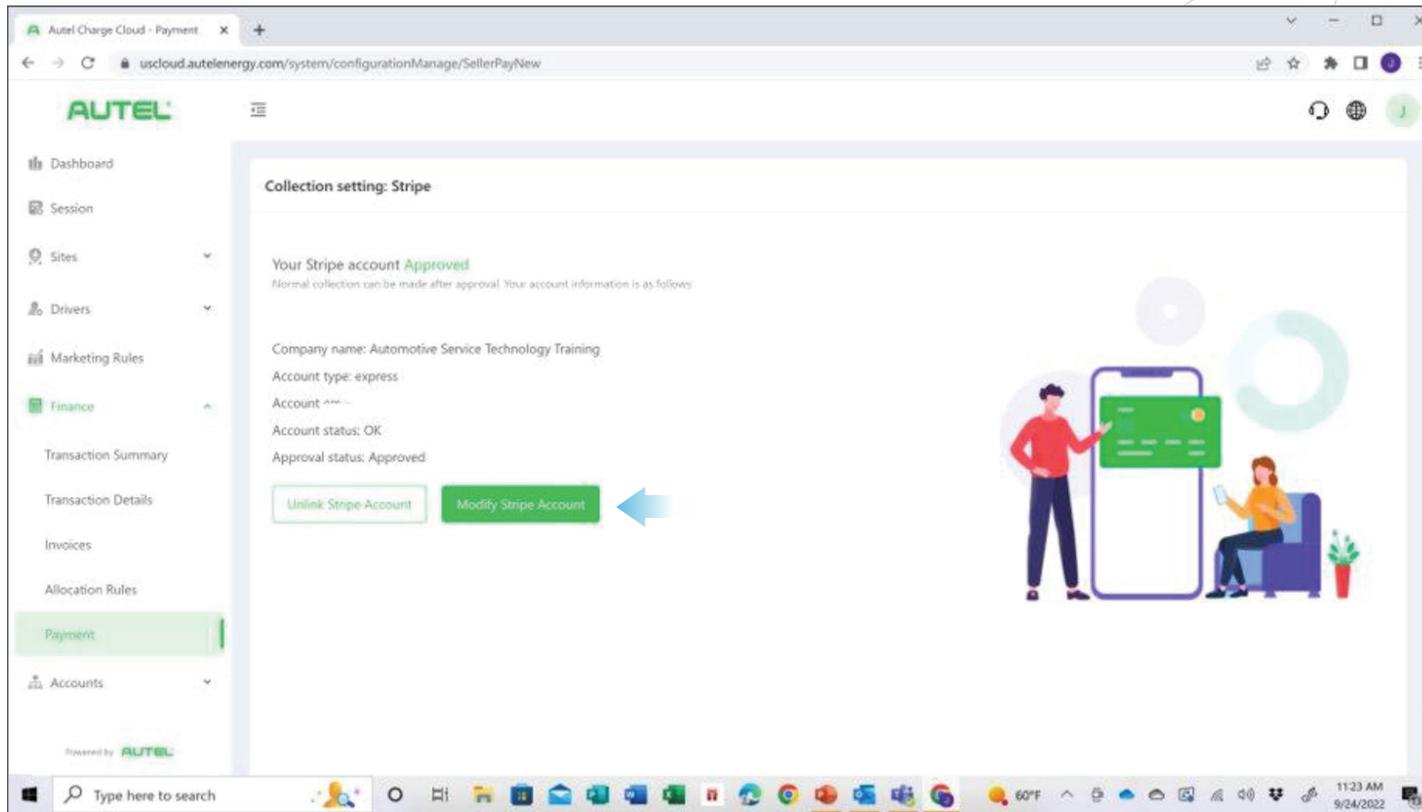
2022-09-24 - Permanent

Cancel OK

To create an allocation rule, fill in the appropriate fields between you and your partner(s)

Select: **OK** when complete

# PAYMENT

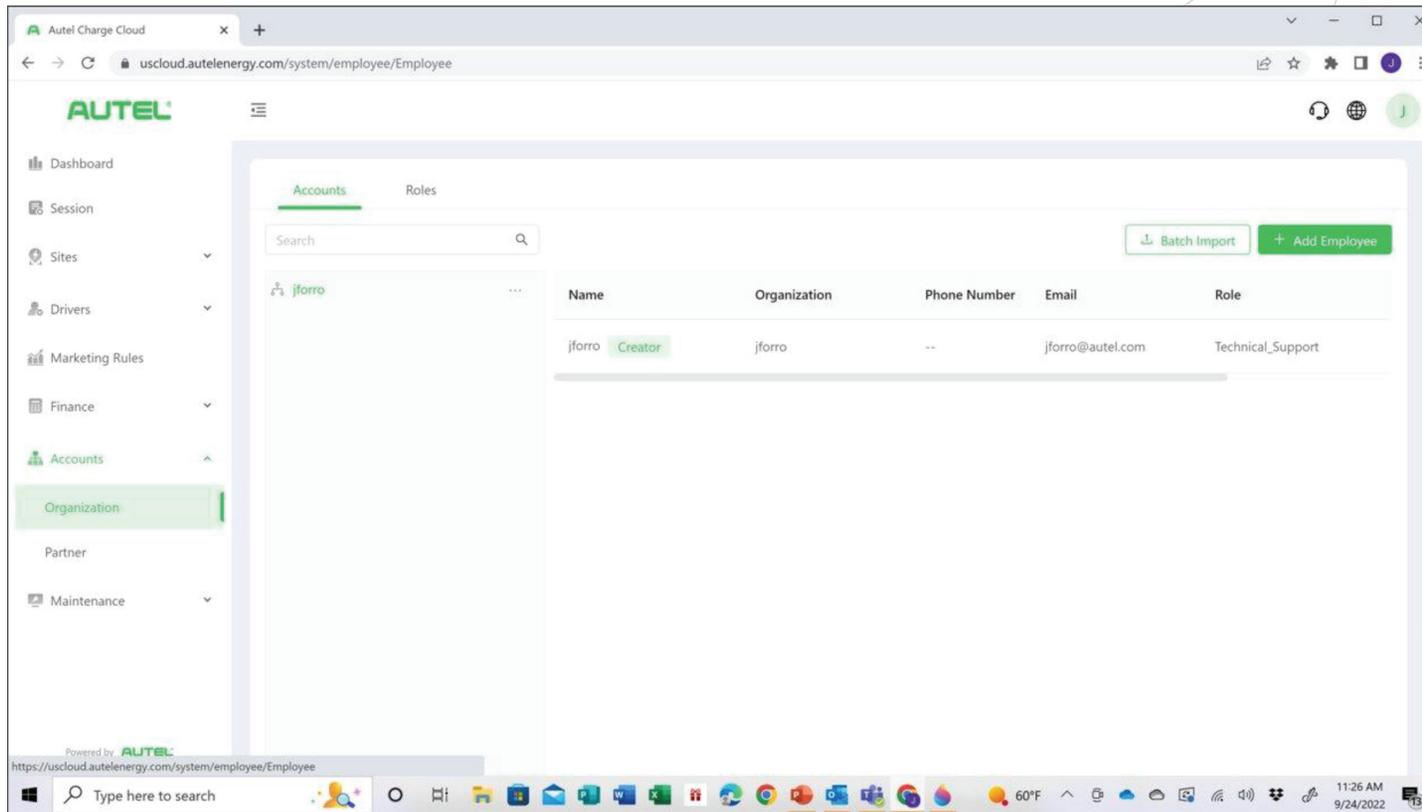


Create your stripe account and your partners stripe accounts for revenue sharing.

One can add as many checking accounts as they wish within the stripe platform.

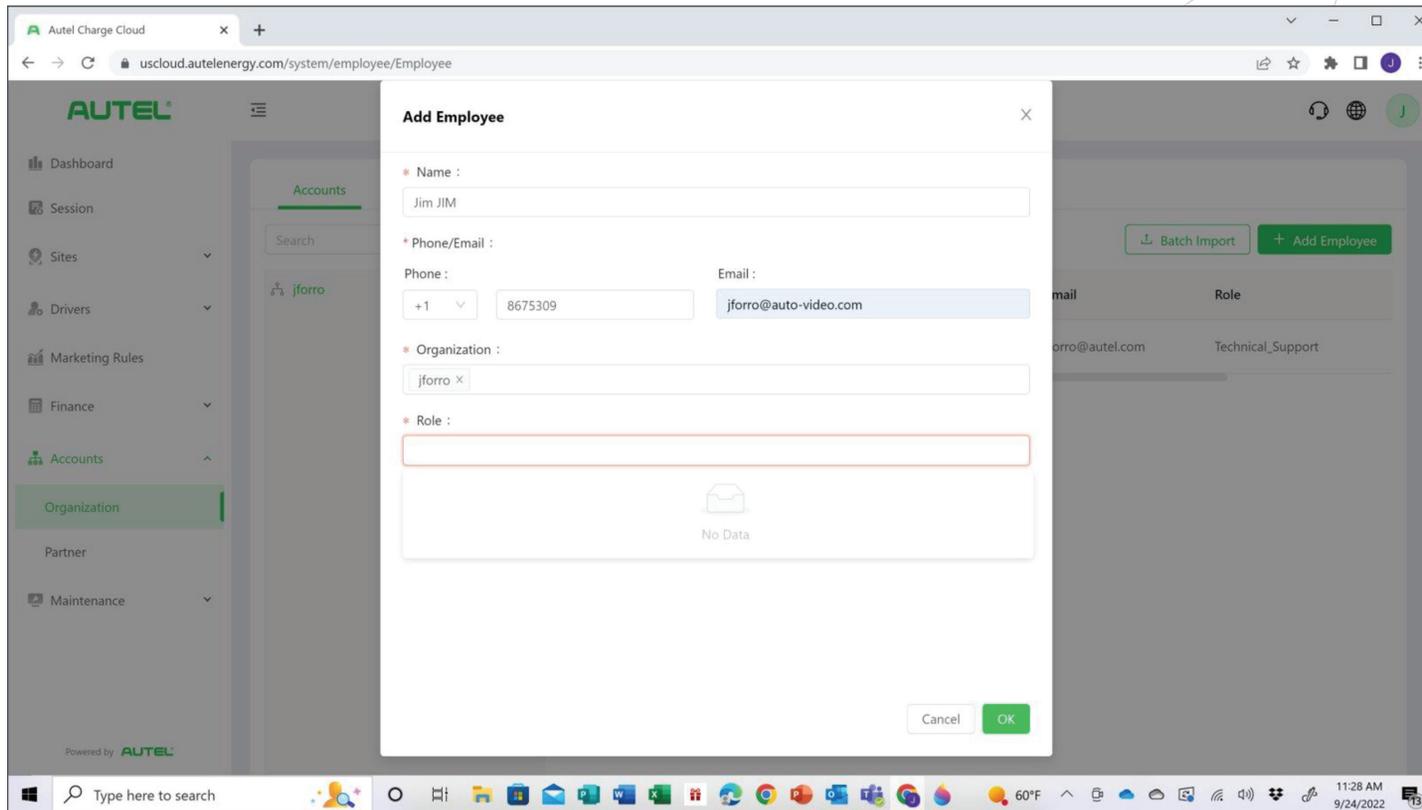
After your stripe account has been created, one can always modify their account to add a partners account for the revenue allocation by selecting **Modify Stripe Account** button.

# ORGANIZATION



The accounts and organization section allows you to add employees and partners and assign them with roles.

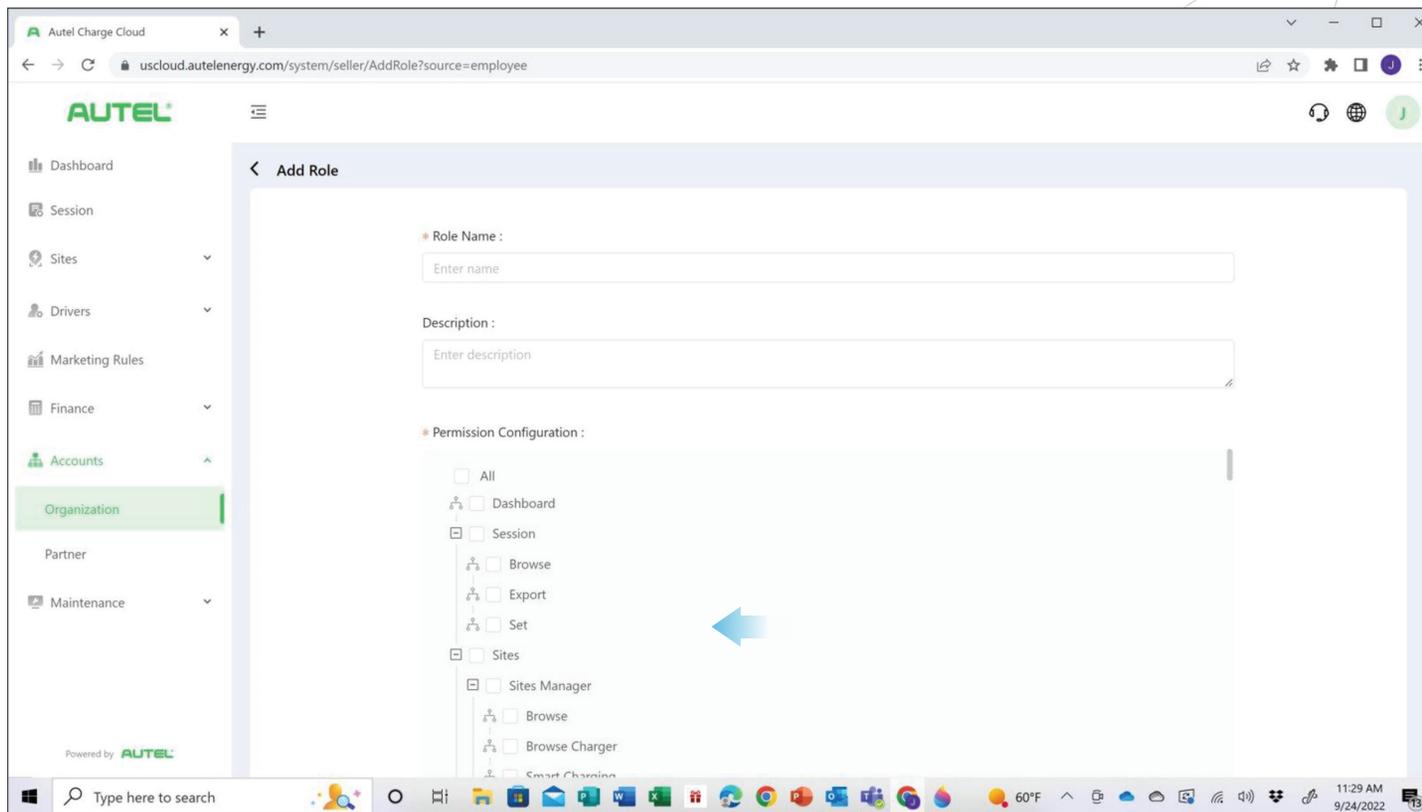
# ADD EMPLOYEES



Click the **Add Employees** button and fill out their information.

Assign them a **Role** at the bottom such as manager or maintenance.

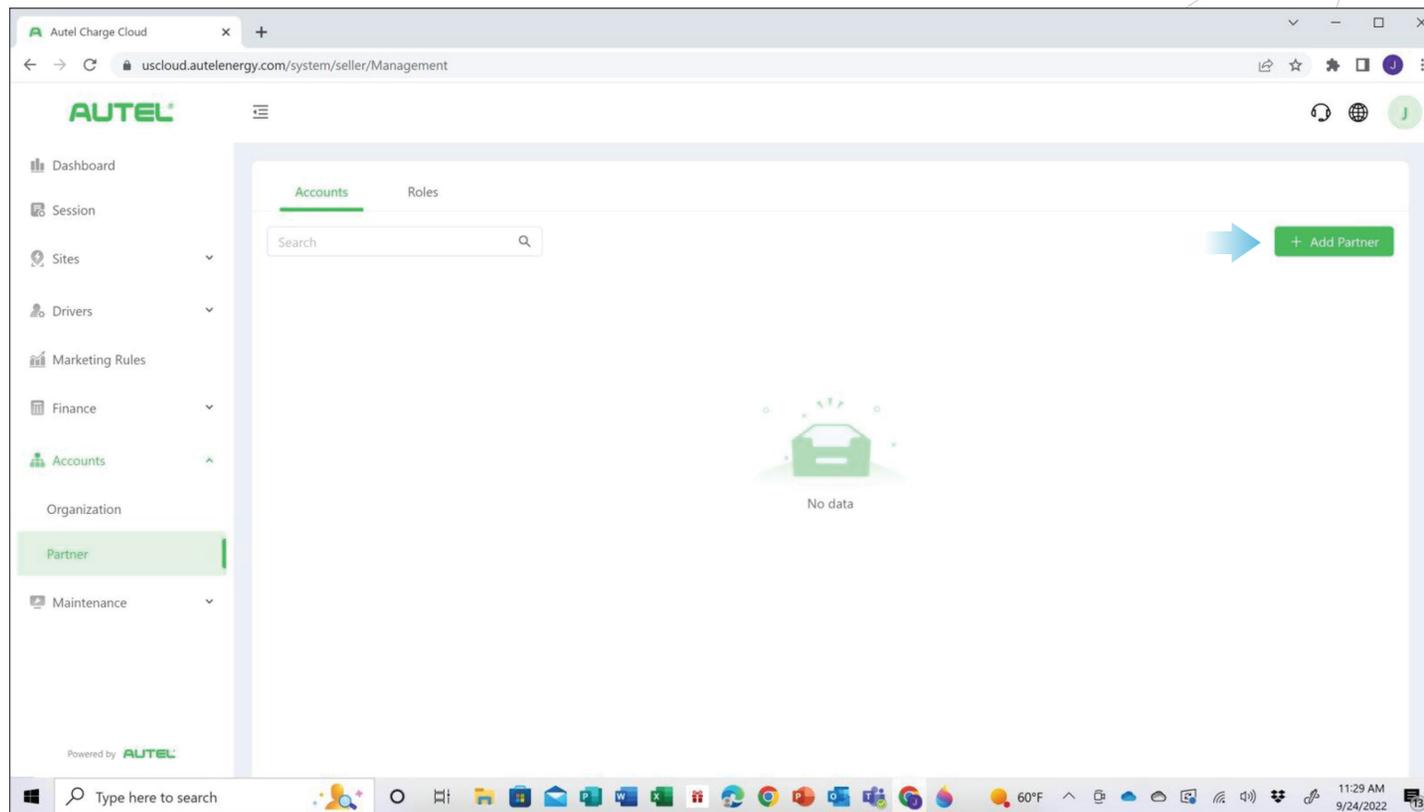
# ADD ROLE



When you create their role, you can select what types of information they will be privy to by selecting the corresponding boxes at the bottom of the screen.

This feature will only allow them to see information pertaining to the boxes you selected while viewing the cloud software.

# PARTNER



To add a partner who will own or operate the site together, select **Add Partner** button.

# ENTER PARTNER INFORMATION

The screenshot shows a web browser window with the URL `uscloud.autelenergy.com/system/seller/AddSeller`. The page title is "Add Partner" and it features a progress indicator with three steps: "1 Enter Partner Information", "2 Create Admin Account", and "3 Link Role". The current step is "Step 1: Enter partner information". The form contains the following fields:

- Name :** Enter
- VAT ID :** Enter (highlighted with a blue arrow)
- Address :** Select Address
  - Country
  - County/district
  - Province/state
  - Company Address
  - Longitude & Latitude
  - Postal code
- Contact :** Enter name
- Email :** Enter email
- Partner Type :** Operation (checked), Advertisement, Maintenance

Fill out all their necessary information including the **VAT ID** (tax ID number) .

This will prevent you from having to be responsible for all the taxes during the revenue sharing

# ADDING A PARTNER

The screenshot shows a web browser window with the URL `uscloud.autelenergy.com/system/seller/AddSeller`. The page title is "Autel Charge Cloud". The main content area is titled "Add Partner" and features a progress indicator with three steps: "1 Enter Partner Information", "2 Create Admin Account", and "3 Link Role". The current step is "Step 1: Enter partner information".

The form includes the following fields:

- Name :** Enter
- VAT ID :** Enter
- Address :** Select Address
  - Country
  - County/district
  - Province/state
  - Company Address
  - Longitude & Latitude
  - Postal code
- Contact :** Enter name
- Email :** Enter email
- Partner Type :** Operation (checked), Advertisement, Maintenance

Blue arrows point to the "Email" and "Partner Type" fields.

Also, be sure to create their emergency Contact information and the Partner Type they will be.

# ADDING A PARTNER

Autel Charge Cloud

uscloud.autelenergy.com/system/seller/AddSeller

**AUTEL**

Dashboard

Session

Sites

Drivers

Marketing Rules

Finance

Accounts

Organization

Partner

Maintenance

Partner Type :

Operation  Advertisement  Maintenance

**Other**

Business License No. :  Enter license number

Legal Representative ID :  Enter legal representative ID

Mailing Address :  Enter address

Postal Code :  Postal code

Alternate Contact :  Enter alternate contact

Alternate Contact No. :  Enter alternate contact number

Official Website :  Enter official website

License Photo:

Powered by **AUTEL**

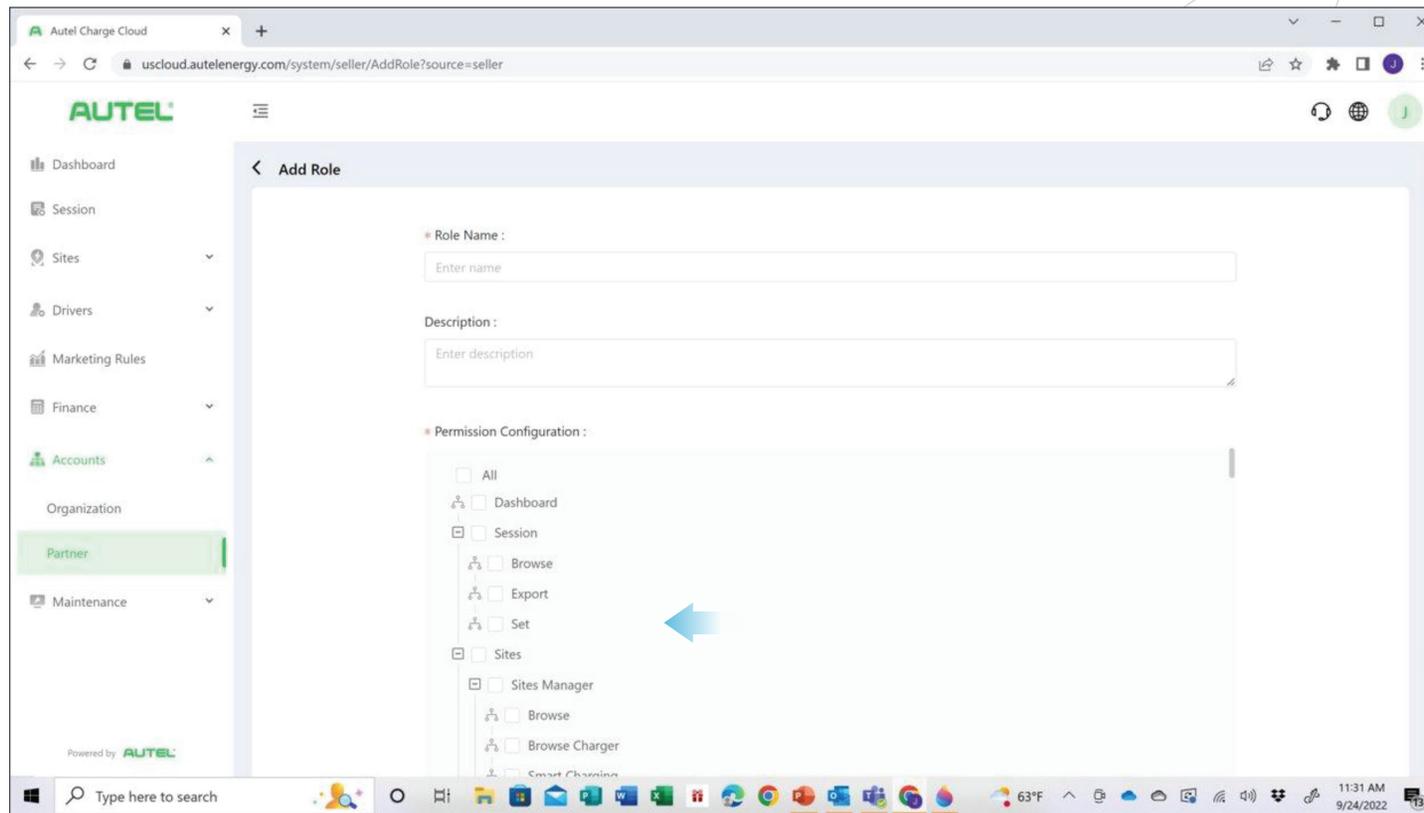
Type here to search

63°F

11:31 AM  
9/24/2022

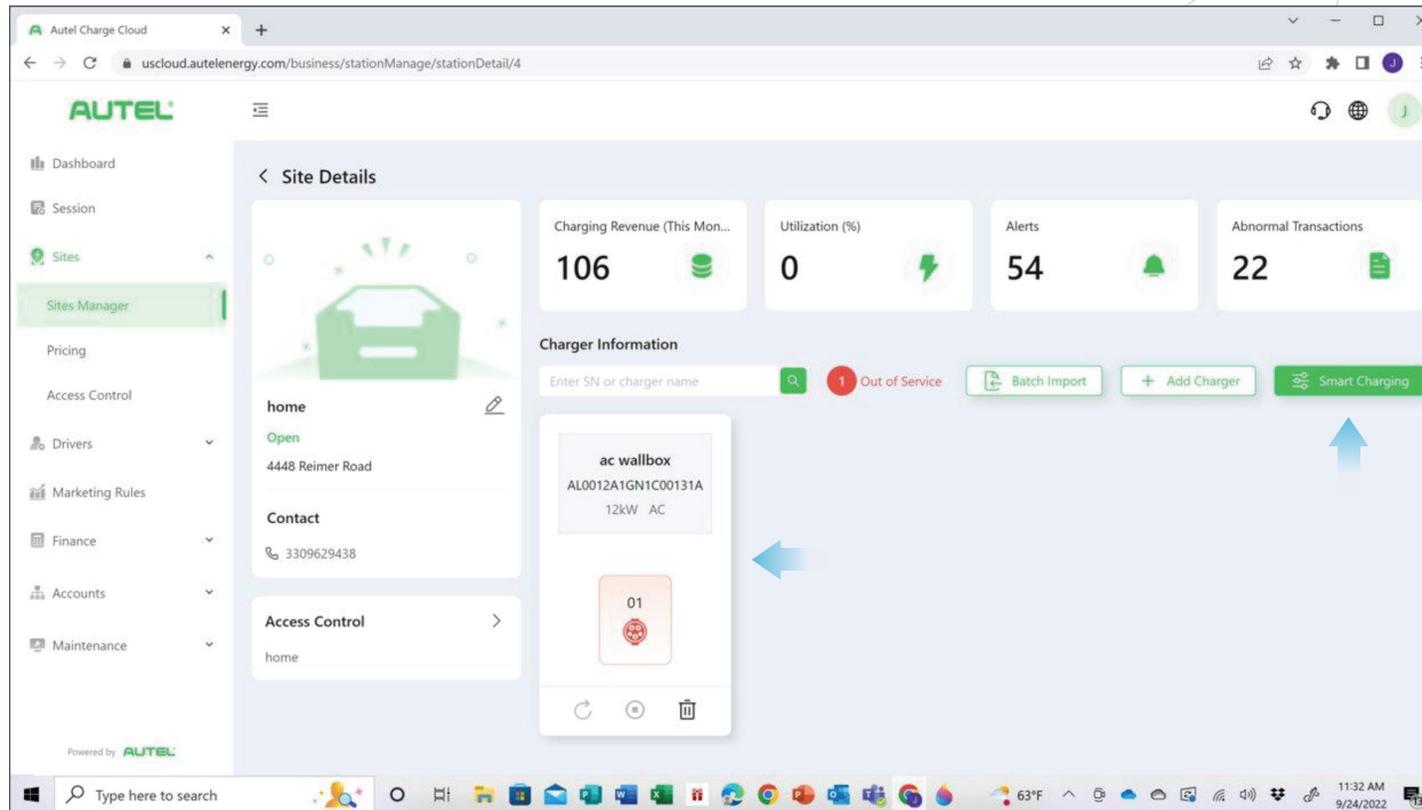
Once the type of partner has been selected, fill in their necessary business information as required.

# PERMISSION CONFIGURATION



Finally, assign them permission allowing them to see whatever aspects of the cloud software you feel is appropriate.

# SITE CONTROLS & SITE MANAGER



Under **Site Manager** section, one can select a specific site and charger for more detailed information and controls.

Select a **Site** and select **Smart Charging**.

When a vehicle is 'smart charging', the charger is essentially 'communicating' with your car, the charging operator and the utility company through data connections. In other words, when-

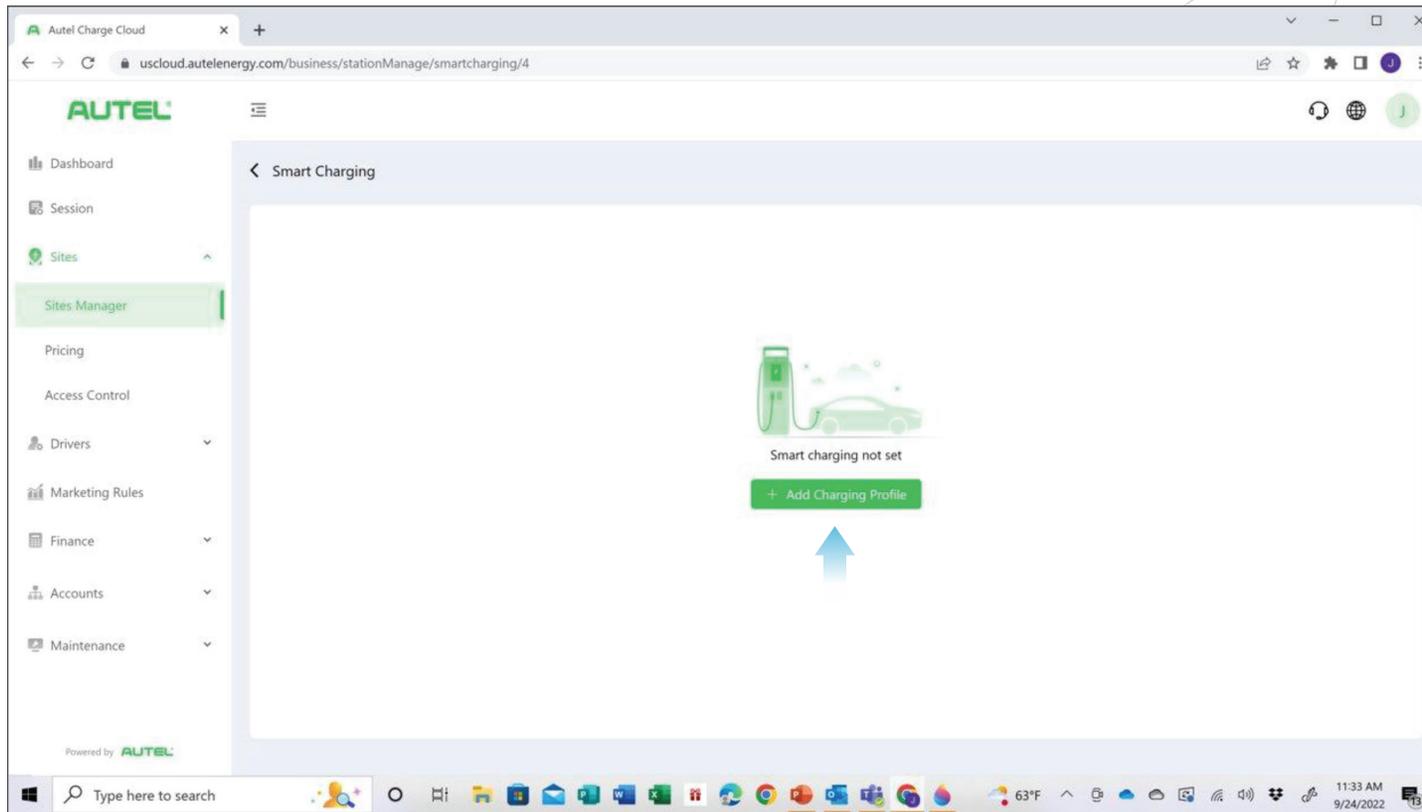
ever you plug in your EV, the charger automatically sends them important data so they can optimize charging.

Thus, smart charging allows the charging operator (be it an individual with a charger at their home or a business owner with multiple charging stations) to manage how much energy to give to any plugged-in EV. The amount used can vary depending on how many people are using electric-

ity at that time, putting less pressure on the grid. Smart charging also prevents charging operators from exceeding their building's maximum energy capacity, as defined by local grid capacities and their chosen energy tariff.

What's more, smart charging allows utility companies to define certain limits for energy consumption. So, we don't overload the grid by using more energy than we are producing.

# SMART CHARGING



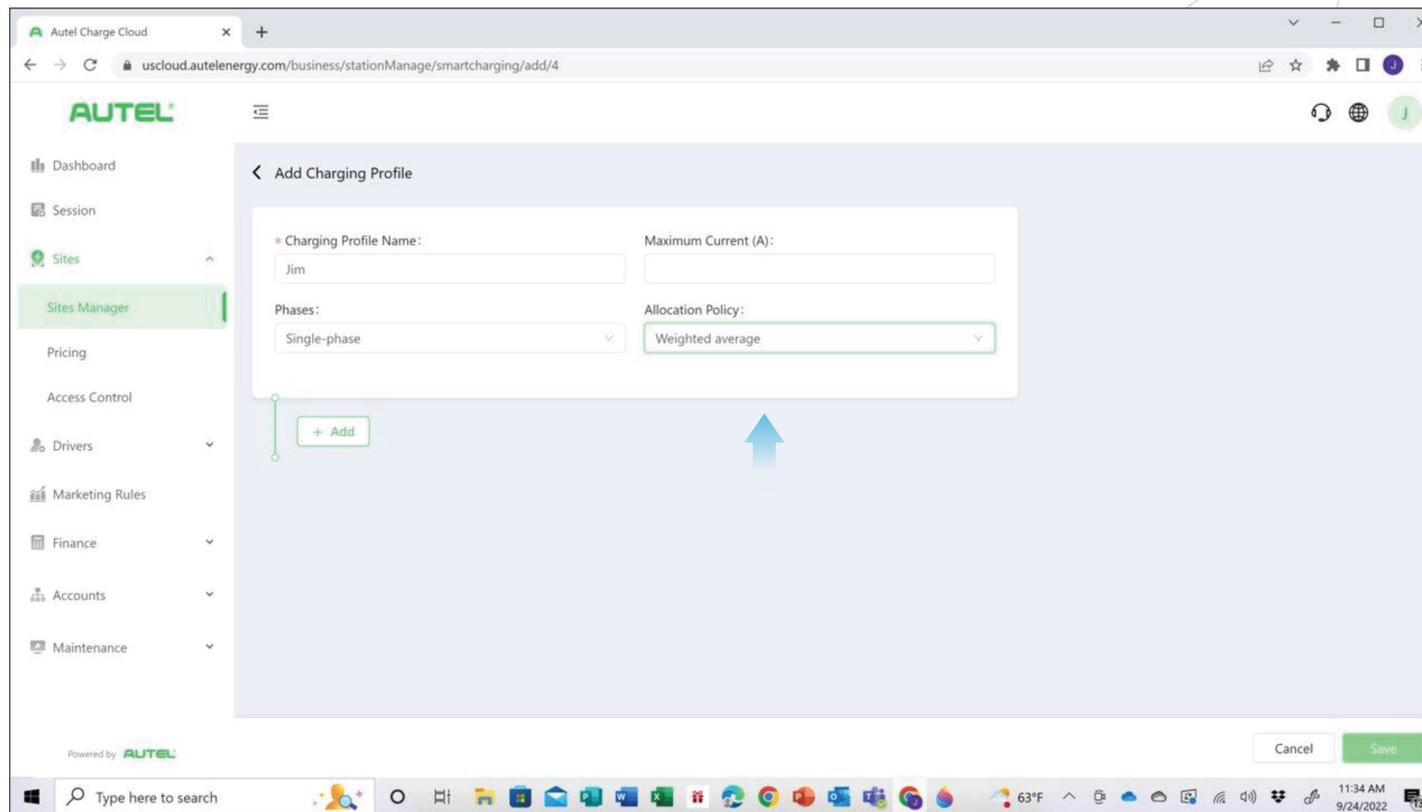
Smart Charging function enables advanced energy management control, once it is selected, select '**Add Charging Profile**'.

Power Sharing allows network operators or

businesses with multiple chargers onsite to distribute the available energy capacity proportionally across all active EV charging stations. As available power is limited at each site, normally more demand for

energy would mean expensive electrical infrastructure upgrades. Smart charging means power can be optimally distributed so that such upgrades can be avoided.

# ADD CHARGING PROFILE



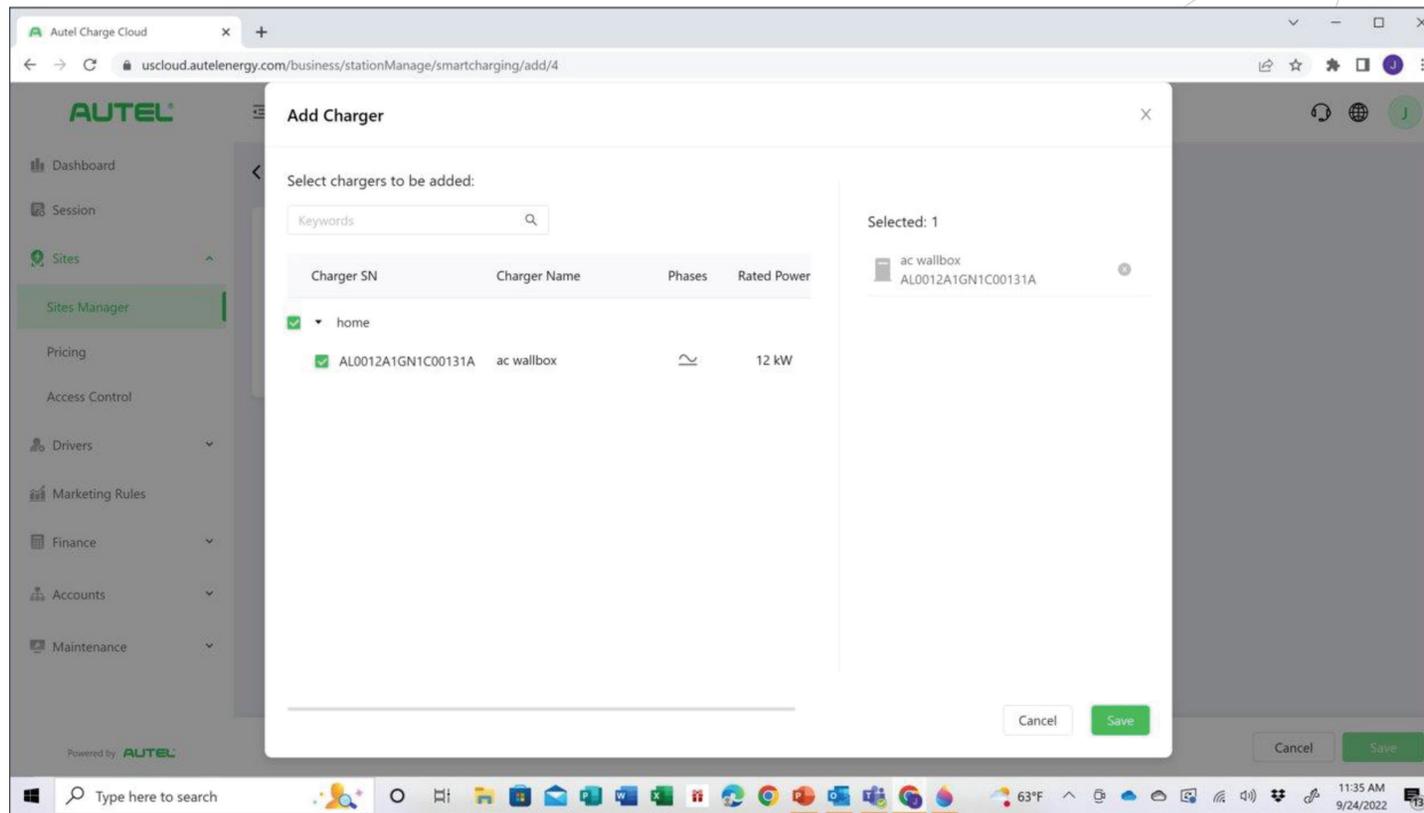
By selecting smart charging, one can set up the chargers on the site to DLB or Dynamic Load Balancing

Name the profile under **Charging Profile Name**

Fill in information pertaining to the chargers on the site

Select **Allocation Policy** such as weighted average meaning the available power will be shared amongst all the chargers you have set up.

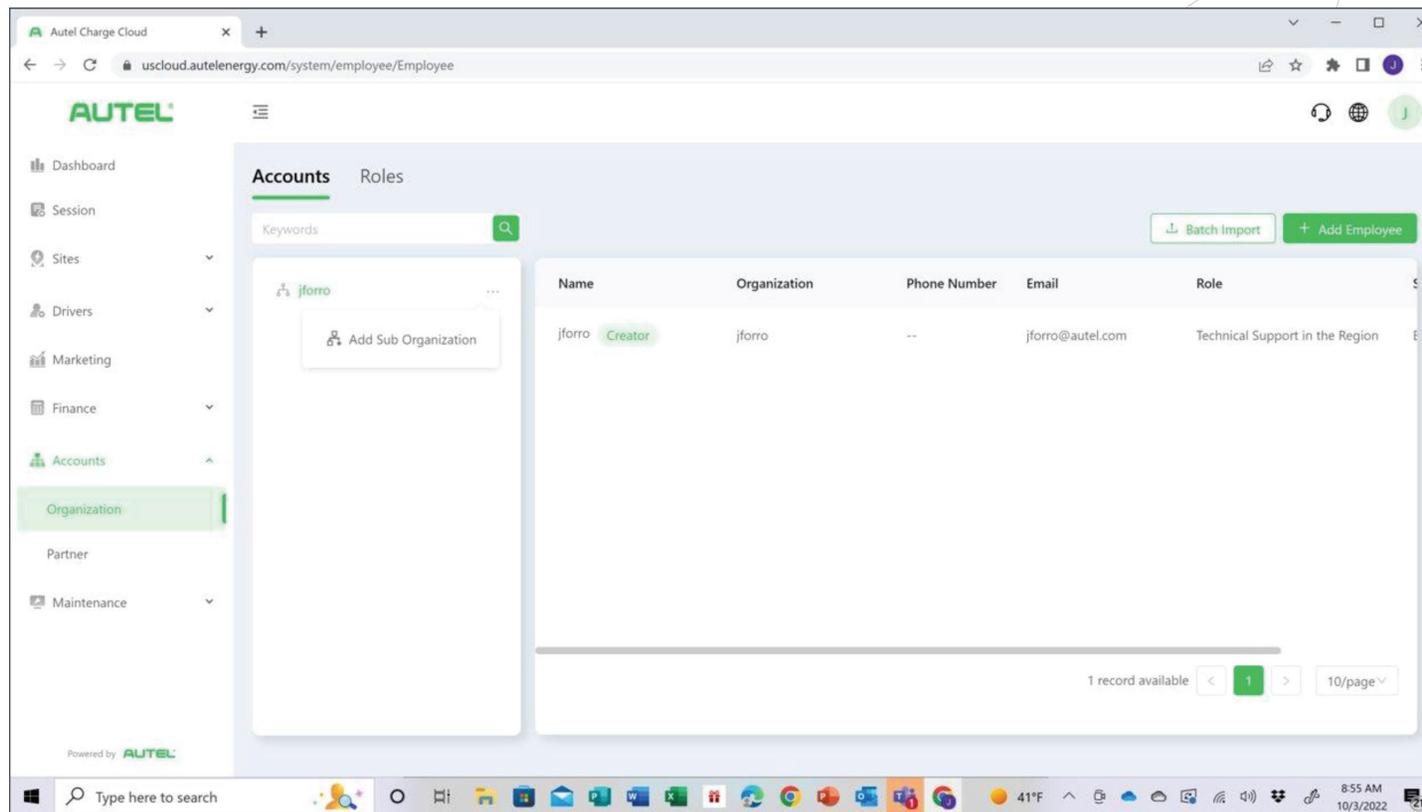
# ADD CHARGER



Select the chargers you want to be assigned to that role from the add charger list.

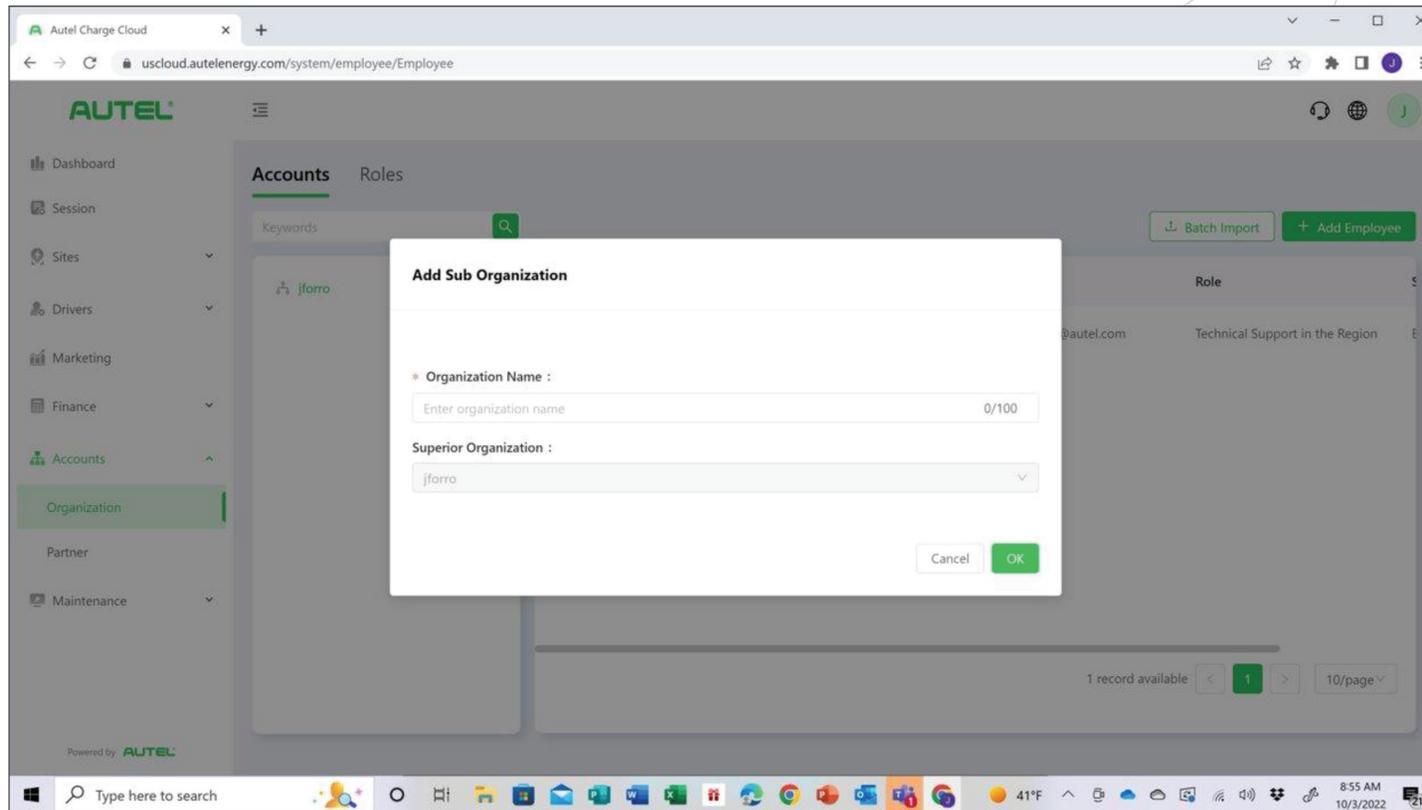
Select **Save** to save your settings

# ADDING TIERED ORGANIZATIONS



After your first organization is set up, one can add sub-organizations by simply selecting the three dots next to the main organization found inside the **Accounts-Organization** menu.

# ADD SUB ORGANIZATION



Fill in appropriate fields to add as many as 100 **Sub Organizations**.



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