

**Inclusive  
Energy**



# **CLOUD SOLAR PLATFORM WALKTHROUGH**

November | 2022

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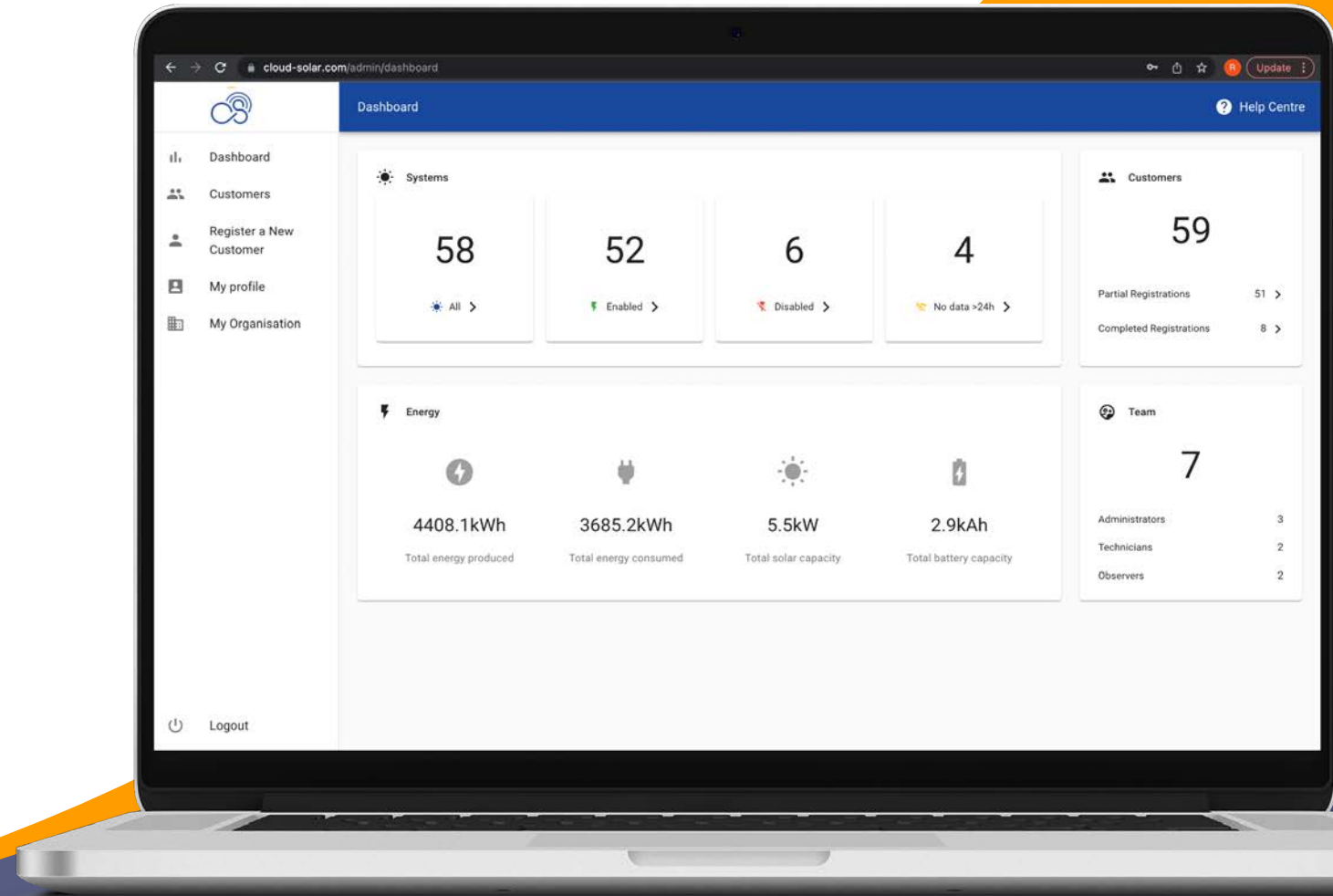
# CLOUD SOLAR FEATURES

The Cloud Solar app is a cloud-based platform created for organisations that want to monitor their solar systems, customer payments and/or solar distribution.

AVAILABLE	COMING SOON
CRM with table and map views, search and filter	Business and energy analytics
Capture and display of asset data + download data	Automated fault diagnosis
Create payment plans	
Pay as you go platform	
Team management	
Notifications	

# Dashboard

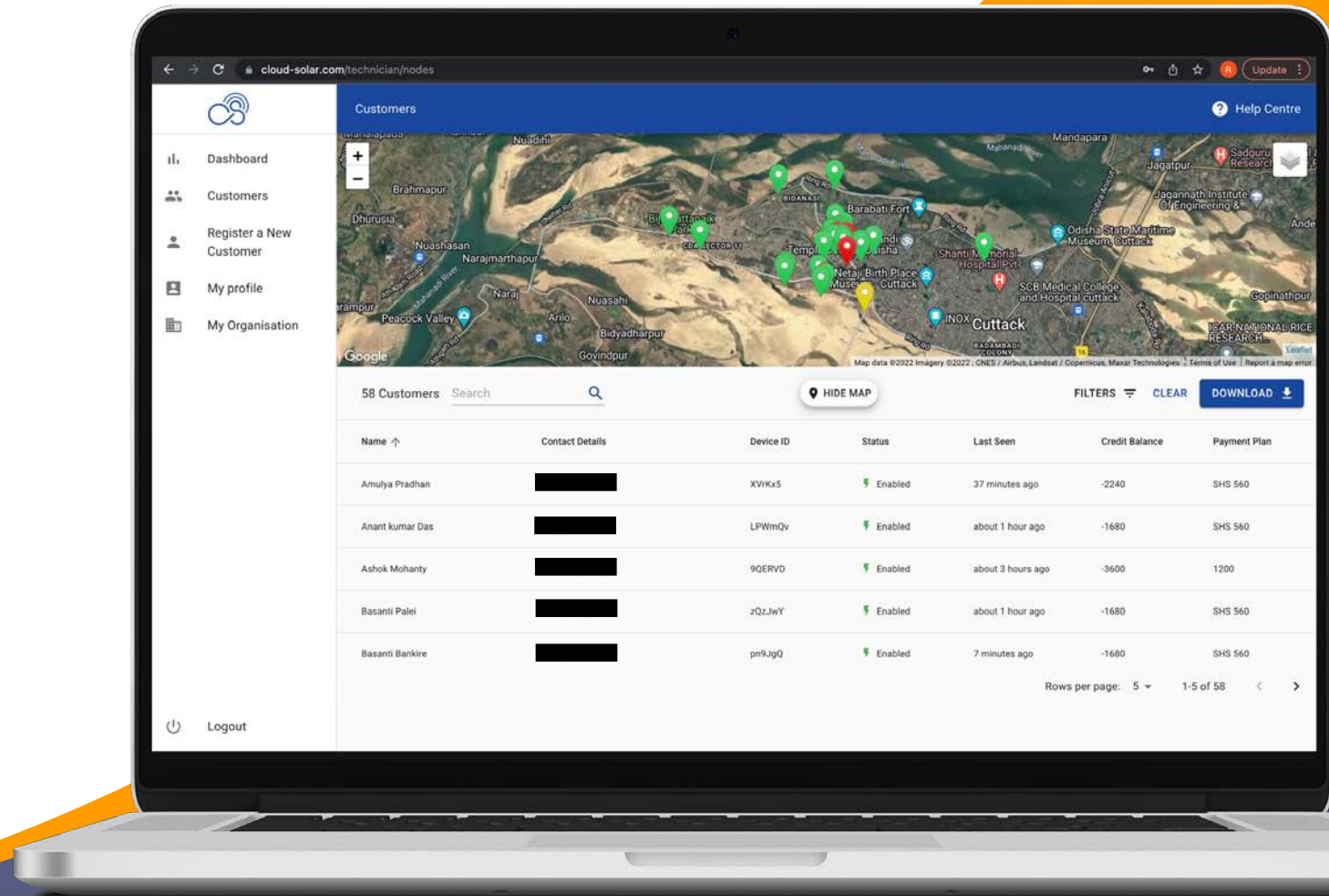
The dashboard exists as a tool to help track, analyse, and display data, usually to give aggregated deployment and energy statistics for all installations across your organisation.



# Customers

An overview of all your customers in one place.

- Map integration to show customer locations.
- Quick view of customer details such as the ID of the installed Cloud Solar device, the status of the load output, when the last time the data was sent, and the customer's payment status.



# Register a Customer

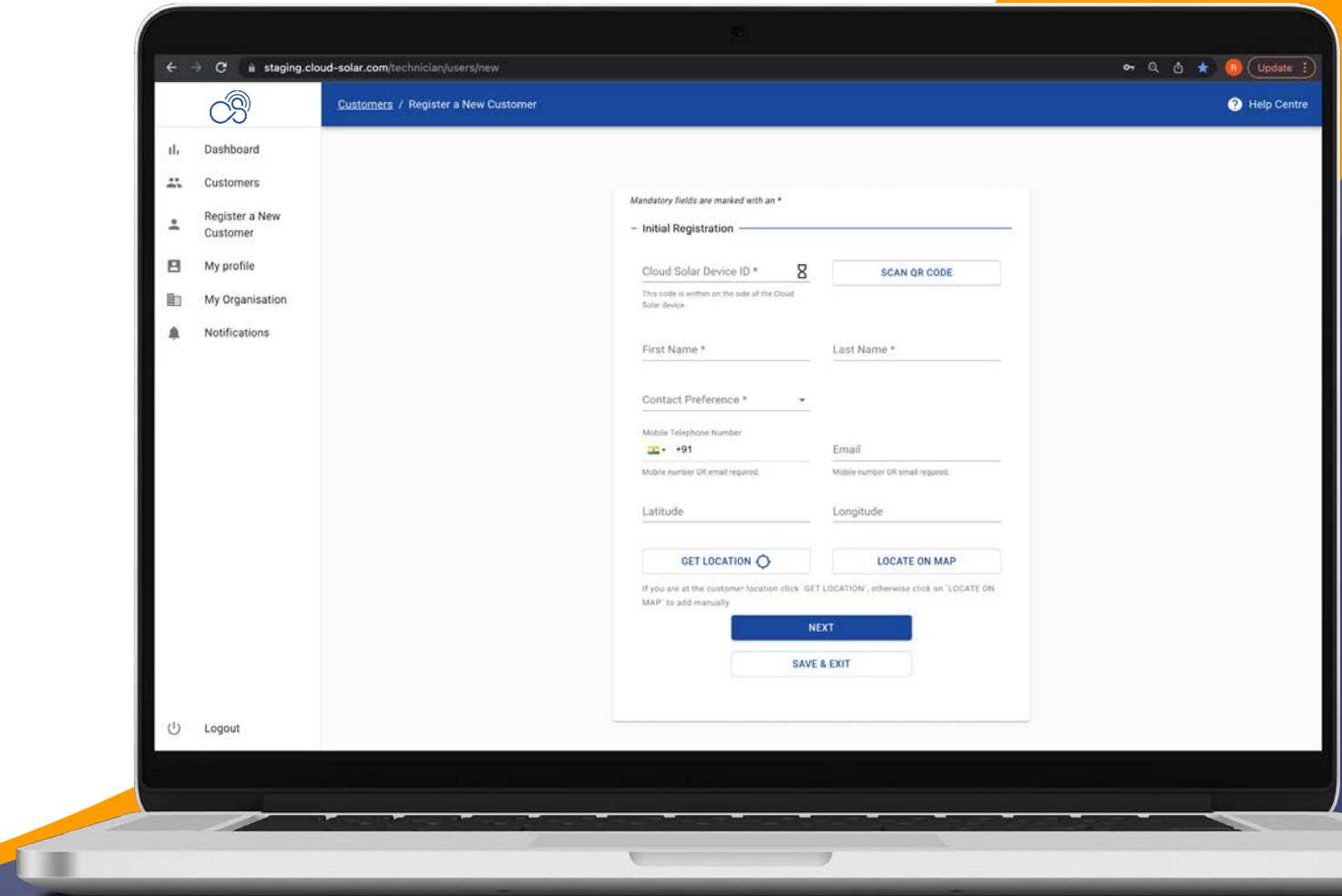
To register a customer, you can either fill in 'Initial Registration' and save it to partially register your customer and come back to it later or fill in all the forms for complete registration.

## 1. Initial Registration

In order to link the user to the Cloud Solar device, you need to enter the Cloud Solar device ID and details of the user associated with it.

You must provide either an email address or phone number for the user and set the contact preference accordingly to get in touch with them if needed.

Input your customer's location automatically using your device's location or by inputting it manually.



The screenshot shows a web browser window displaying the 'Register a New Customer' form. The browser address bar shows 'staging.cloud-solar.com/technician/users/new'. The page title is 'Customers / Register a New Customer'. The form is titled 'Initial Registration' and includes the following fields and buttons:

- Cloud Solar Device ID \***: A text input field with a QR code icon and a 'SCAN QR CODE' button. A note below states: 'This code is written on the side of the Cloud Solar device.'
- First Name \*** and **Last Name \***: Two text input fields.
- Contact Preference \***: A dropdown menu.
- Mobile Telephone Number**: A text input field with a country code dropdown set to '+91'. A note below states: 'Mobile number OR email required.'
- Email**: A text input field. A note below states: 'Mobile number OR email required.'
- Latitude** and **Longitude**: Two text input fields.
- GET LOCATION** and **LOCATE ON MAP**: Two buttons for location selection.
- Next** and **SAVE & EXIT**: Two buttons at the bottom of the form.

A note at the bottom of the form reads: 'If you are at the customer location click "GET LOCATION", otherwise click on "LOCATE ON MAP" to add manually.'

# Register a Customer

## 2. User Details

Fill in basic user information.

## 3. Payment Plan

If the customer has purchased their solar system on a financing scheme, you can select the payment plan according to your agreement with them.

## 4. Associations

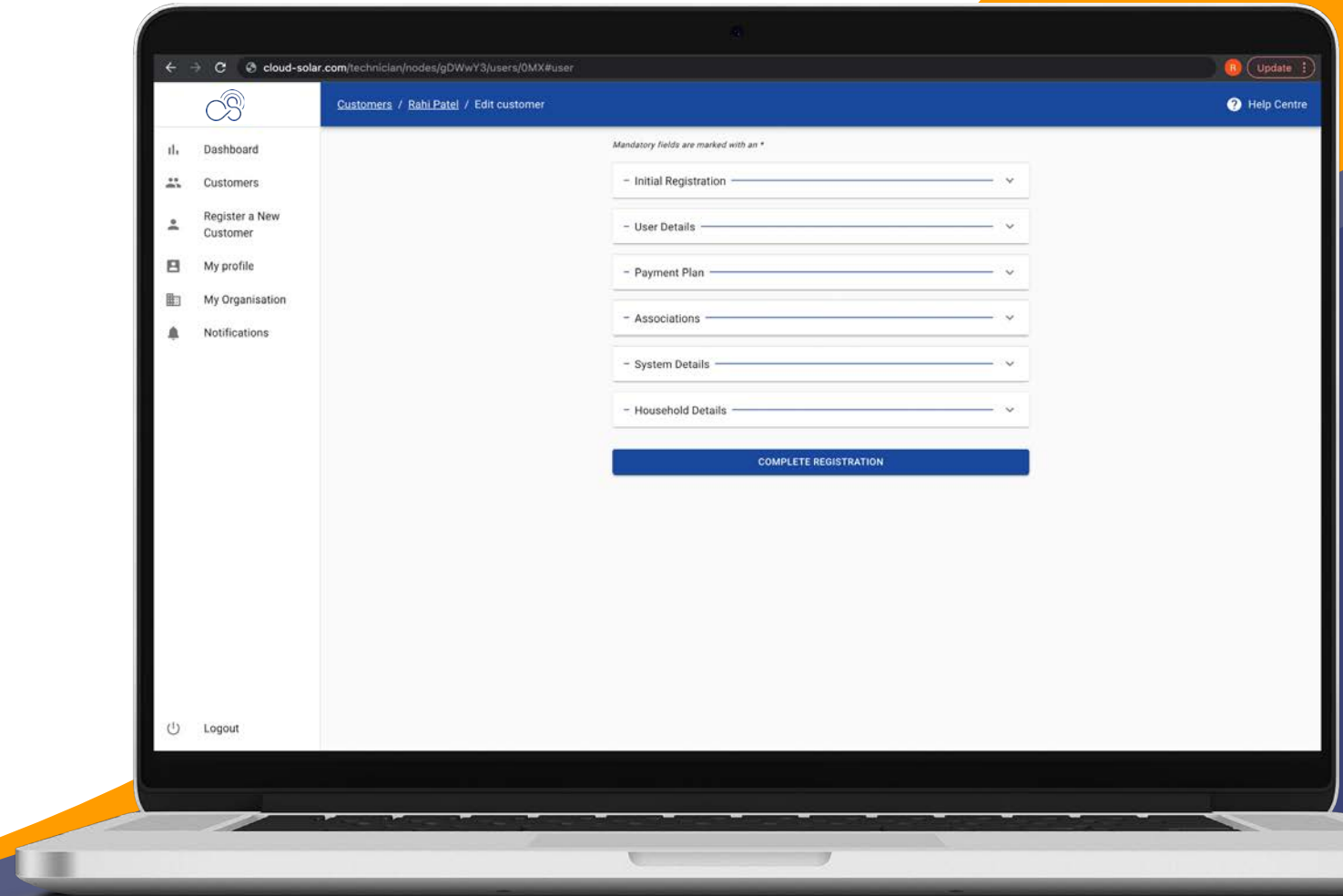
You can associate a partner organisation with the installation, this might be useful if you receive funding from a particular organisation, or for creating customer groups.

## 5. System Details

Fill in the details of your customer's solar home system and their setup. This will be useful while providing after-sales service to the customer.

## 6. Household Details

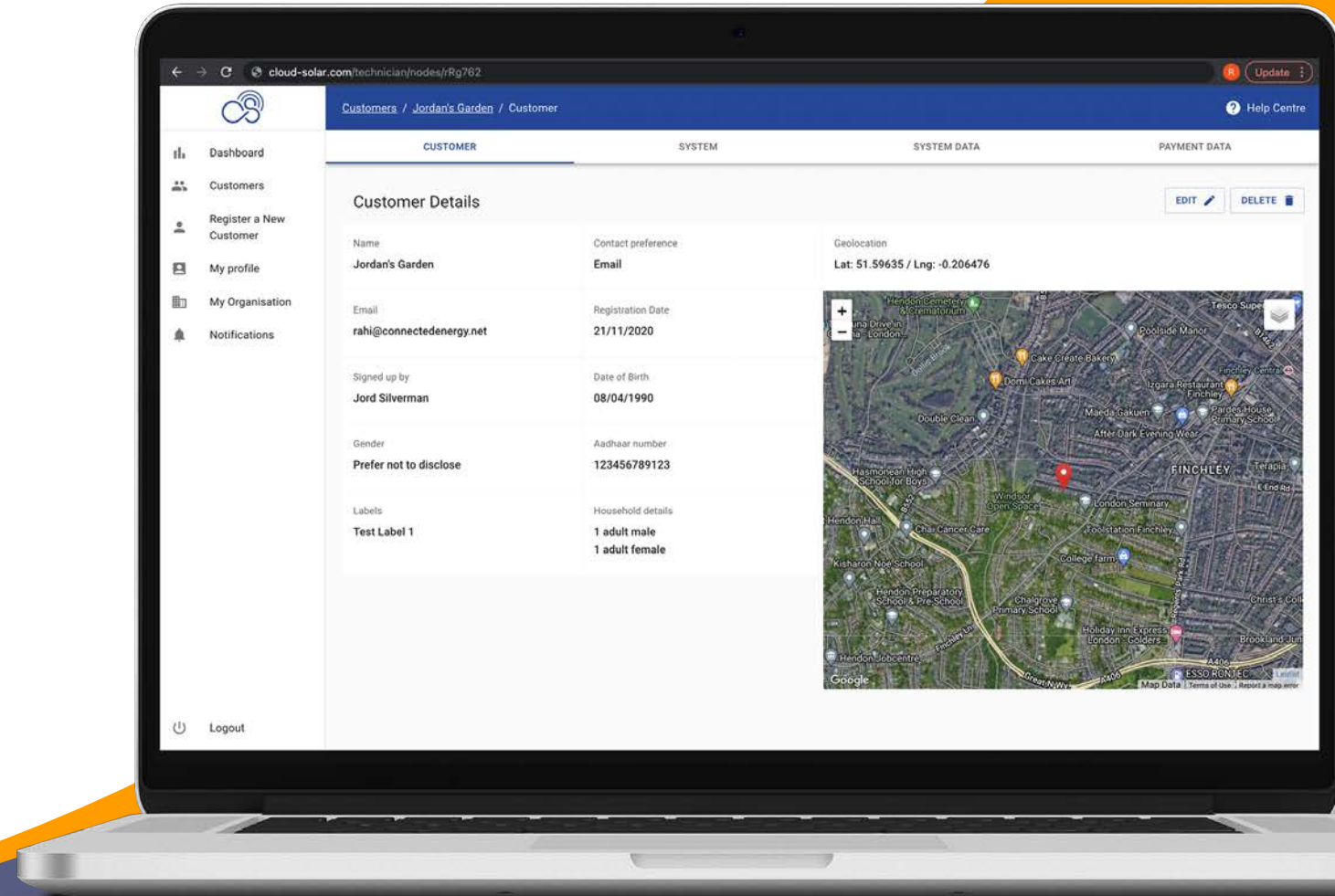
Filling in household details helps to gain a better understanding of the demographic of your customers amongst your team.



# Customer Details

You can click on any customer and view their personal details.

You can also edit either of these or delete the customer altogether.

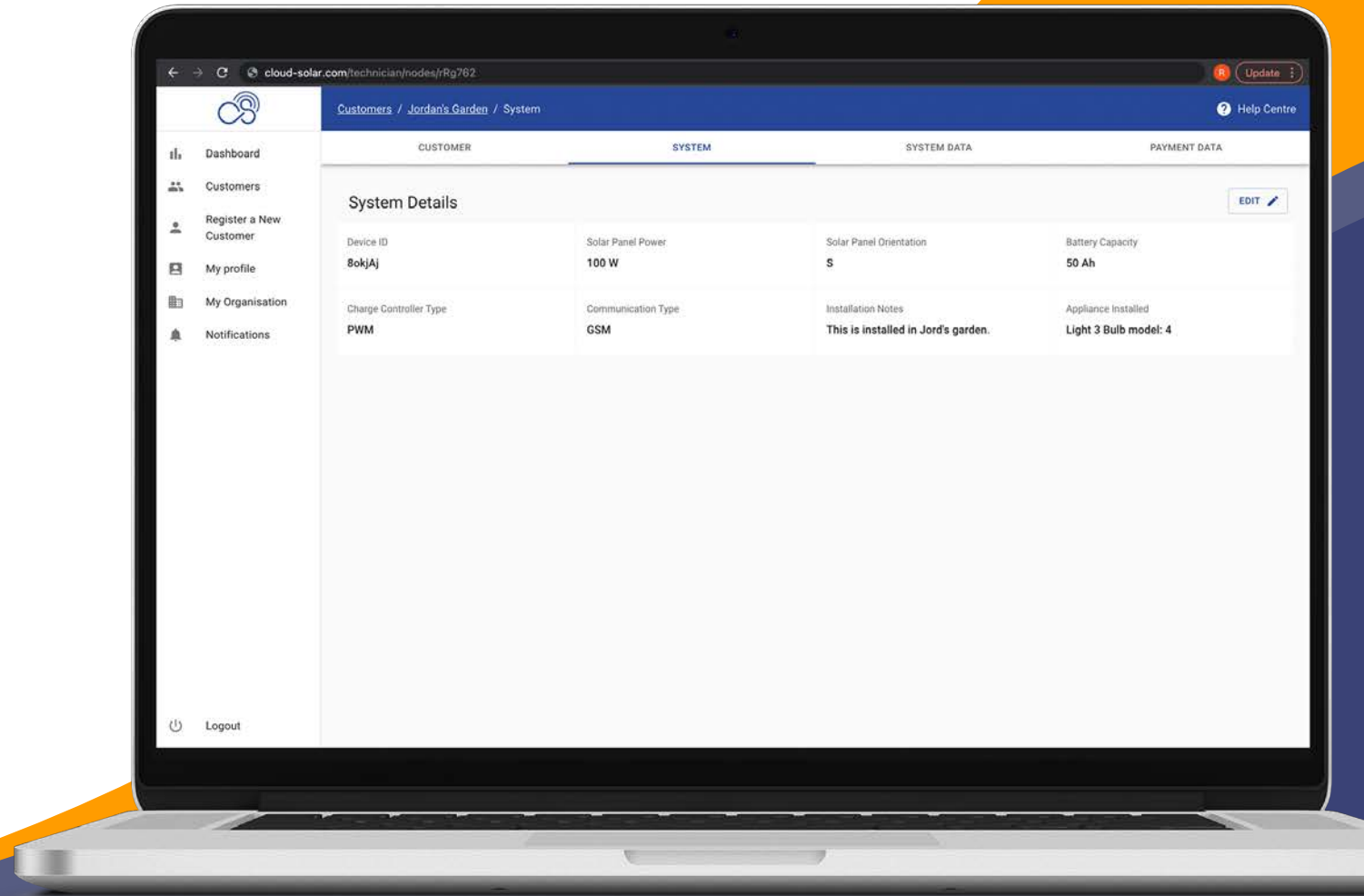




# System (details)

You can view your customer's system and device details after clicking on the 'system' button of the customer you have selected.

You can also edit either of these apart from 'charge controller type' and 'communication type'.



# System Data

You can view your customer's system data after clicking on the 'system data' button of the customer you have selected.

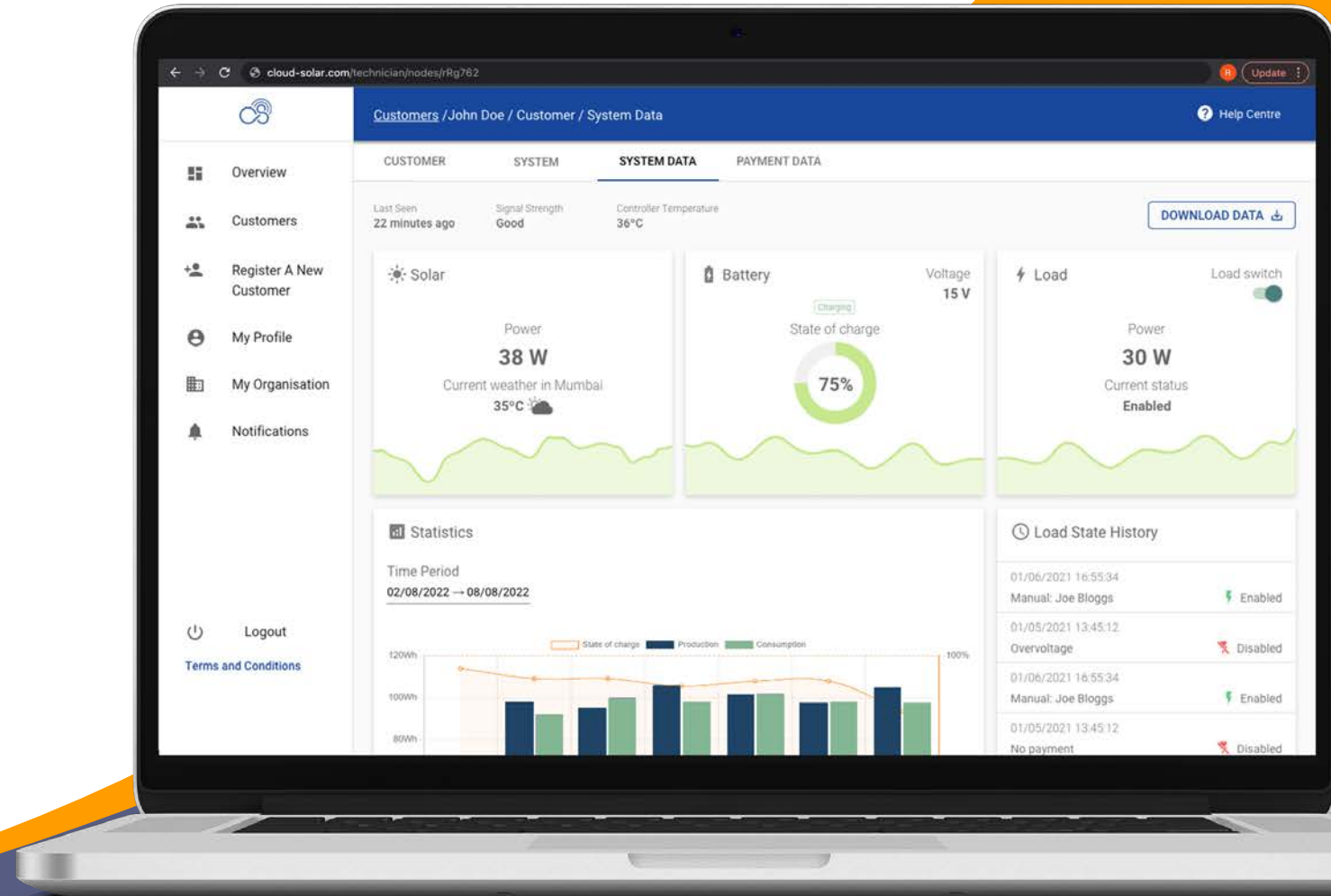
It gives you live updates of your customer's system status.

**Battery:** This widget tells you how much battery charge you have left and also tells you the temperature of the charge controller.

**Solar Power:** Power of the solar input as well as the current weather.

**Load State:** This widget allows you to manually switch off the customer's load output from the Cloud Solar charge controller. It also gives you a history of the load output state for example if it switches off because if the user runs out of credit or the battery is running low

**Load Power:** Power connected to load output.

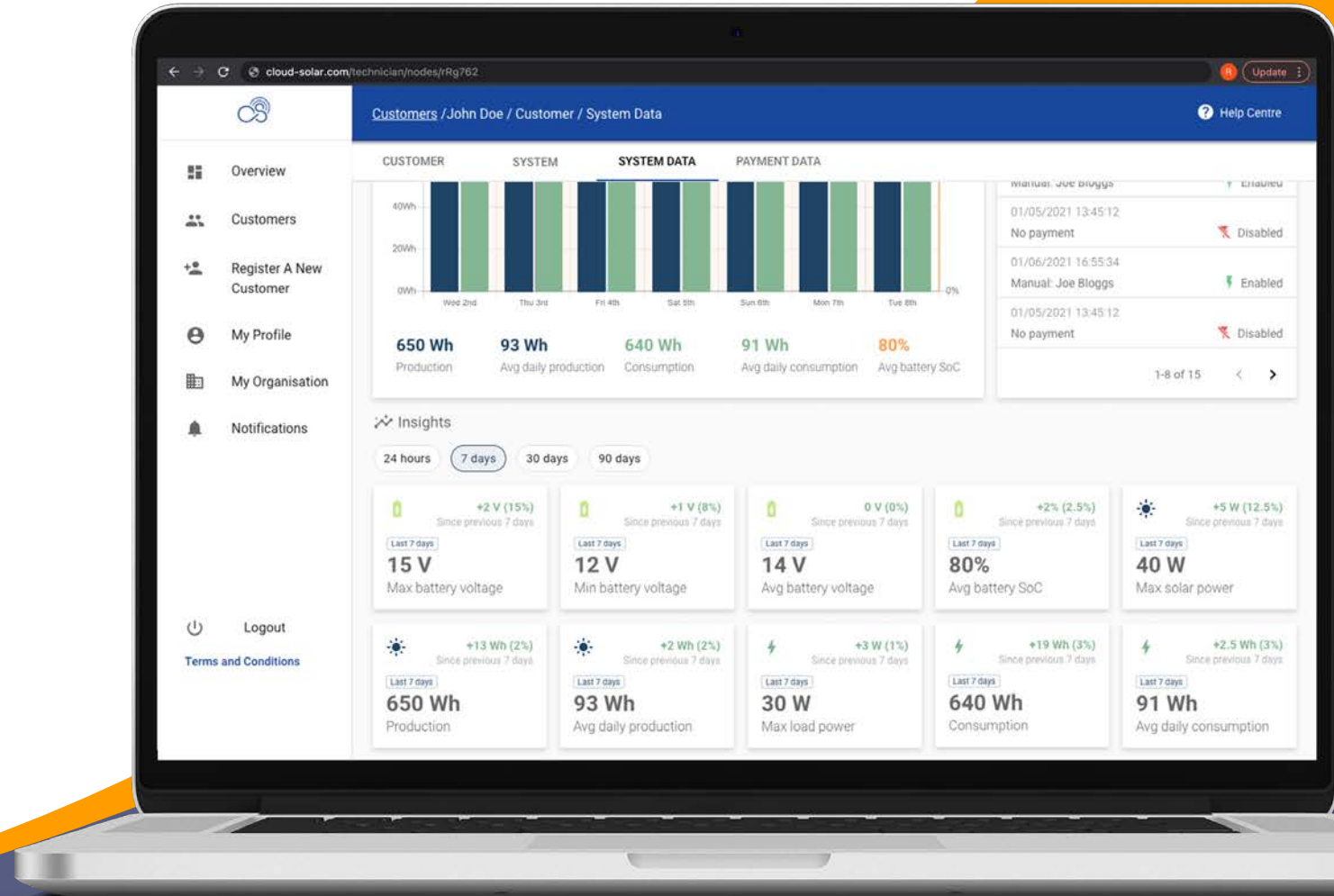


# System Data

**Production & Consumption:** You can view state of charge, energy production and consumption data over a selected time range to check whether the solar system is performing as expected.

**Insights:** You can gain an accurate and deeper understanding of your customers system data over time through the insights section.

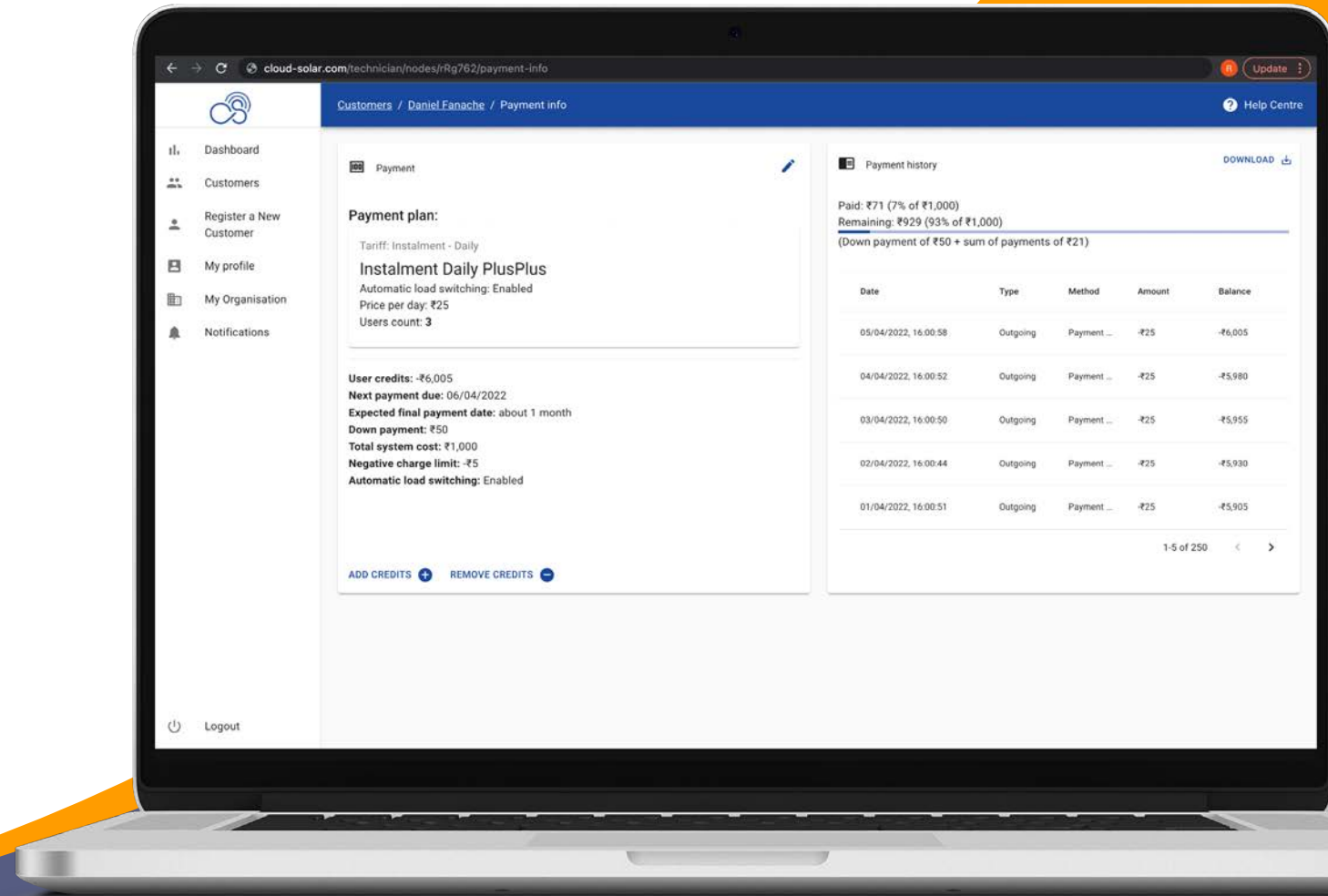
You can also download all of their metered data.



# Customer Payment

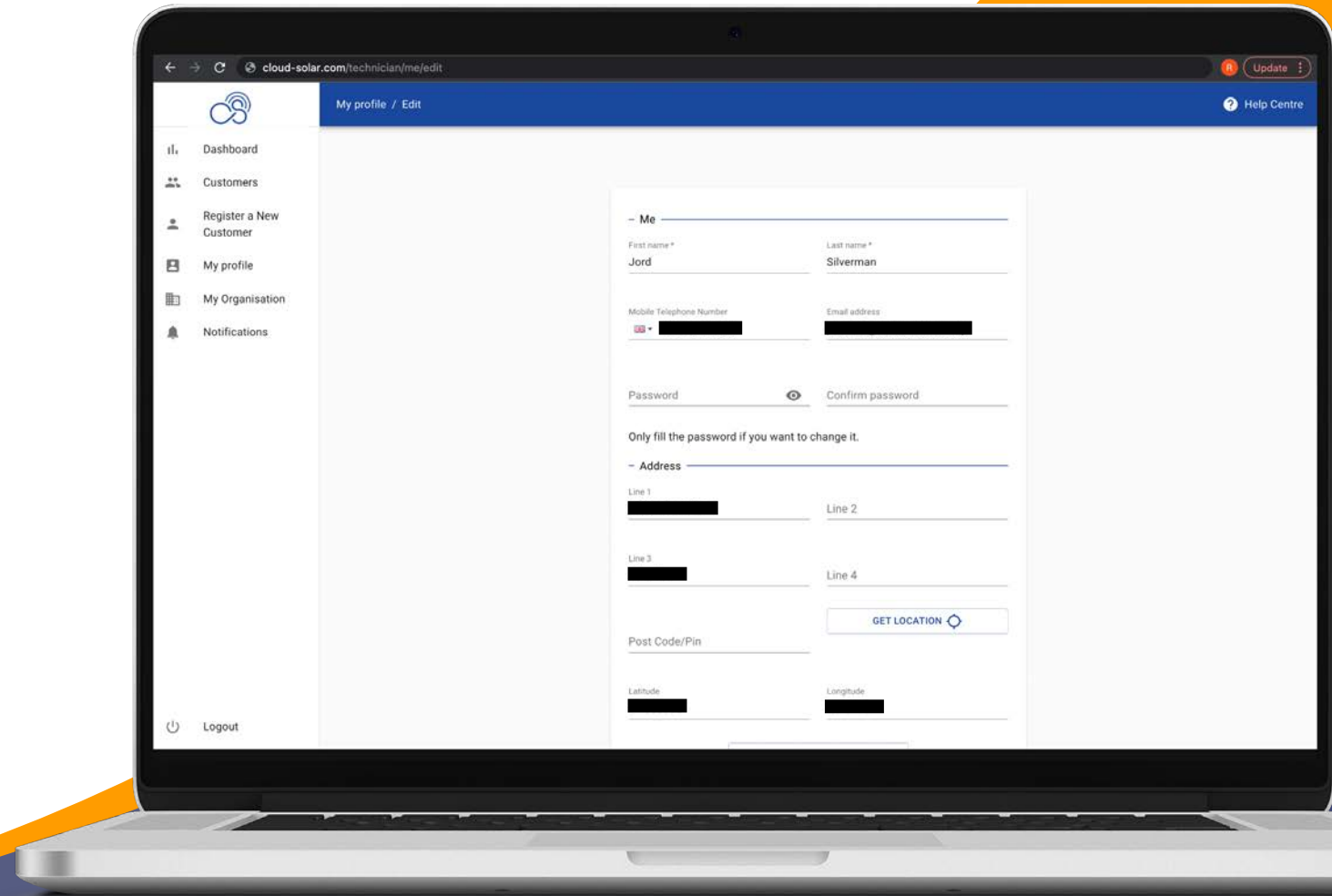
If your customer is paying for their installation over time under a financing scheme, the payments tab allows you to keep track of their payment plan and the repayments they have made.

You can also view a summary of your customer's payment history, add or remove credits and download their payment data.



# My Profile

Keep your profile details up to date so other members of your team can contact you.



# My Organisation

## Profile

Under the 'Profile' tab, view and edit your organisation's profile details by filling out the following detail forms.

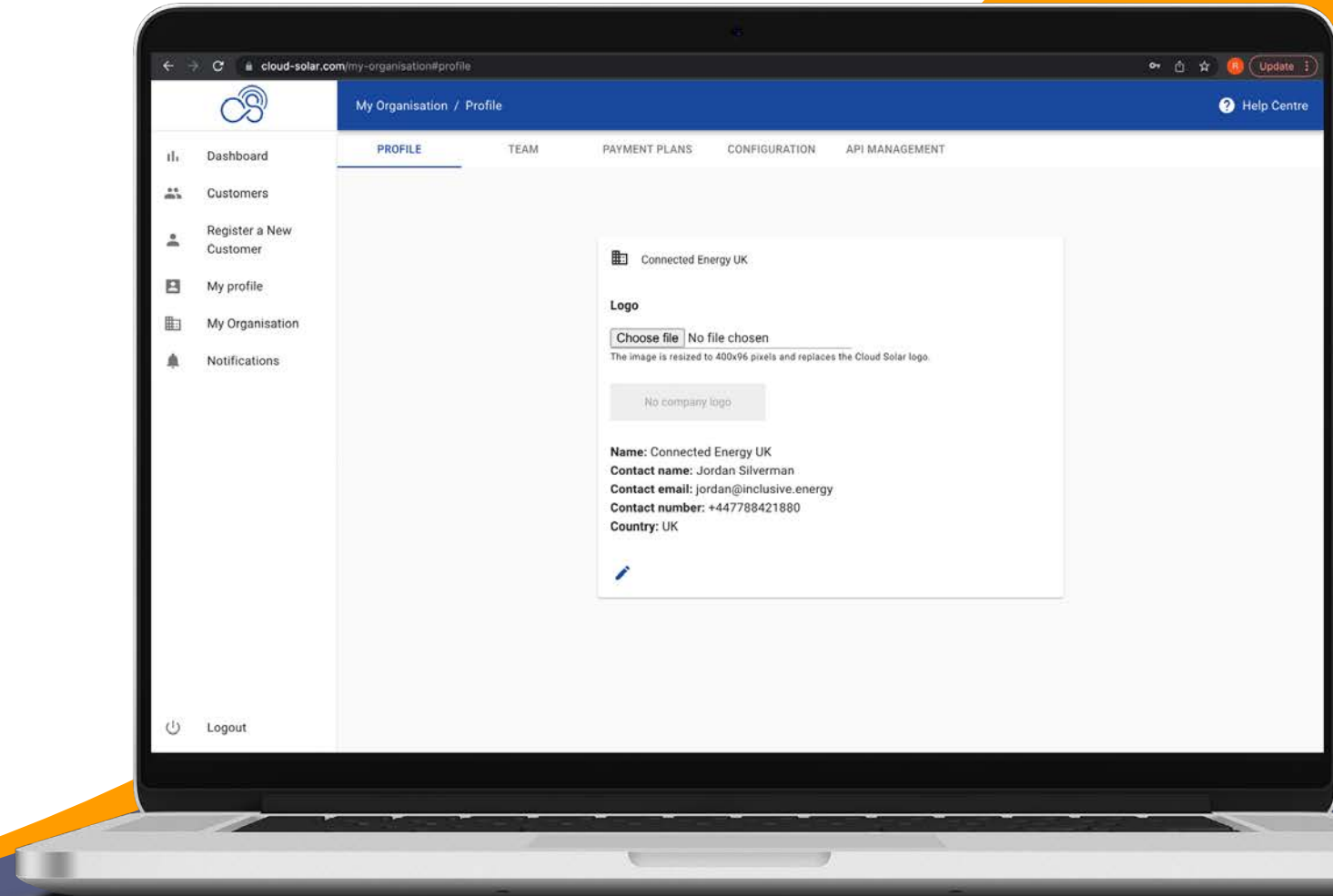
### 1. Logo

Your organisation's logo will replace the Cloud Solar logo in the top left corner for your whole team.

### 2. Organisation details

Keep your organisation's name up to date as this is used in communications with your customers. Provide your company's contact details for Inclusive Energy to easily get in touch with you for any communication required.

Changing the country will affect the currency used across the Cloud Solar platform.

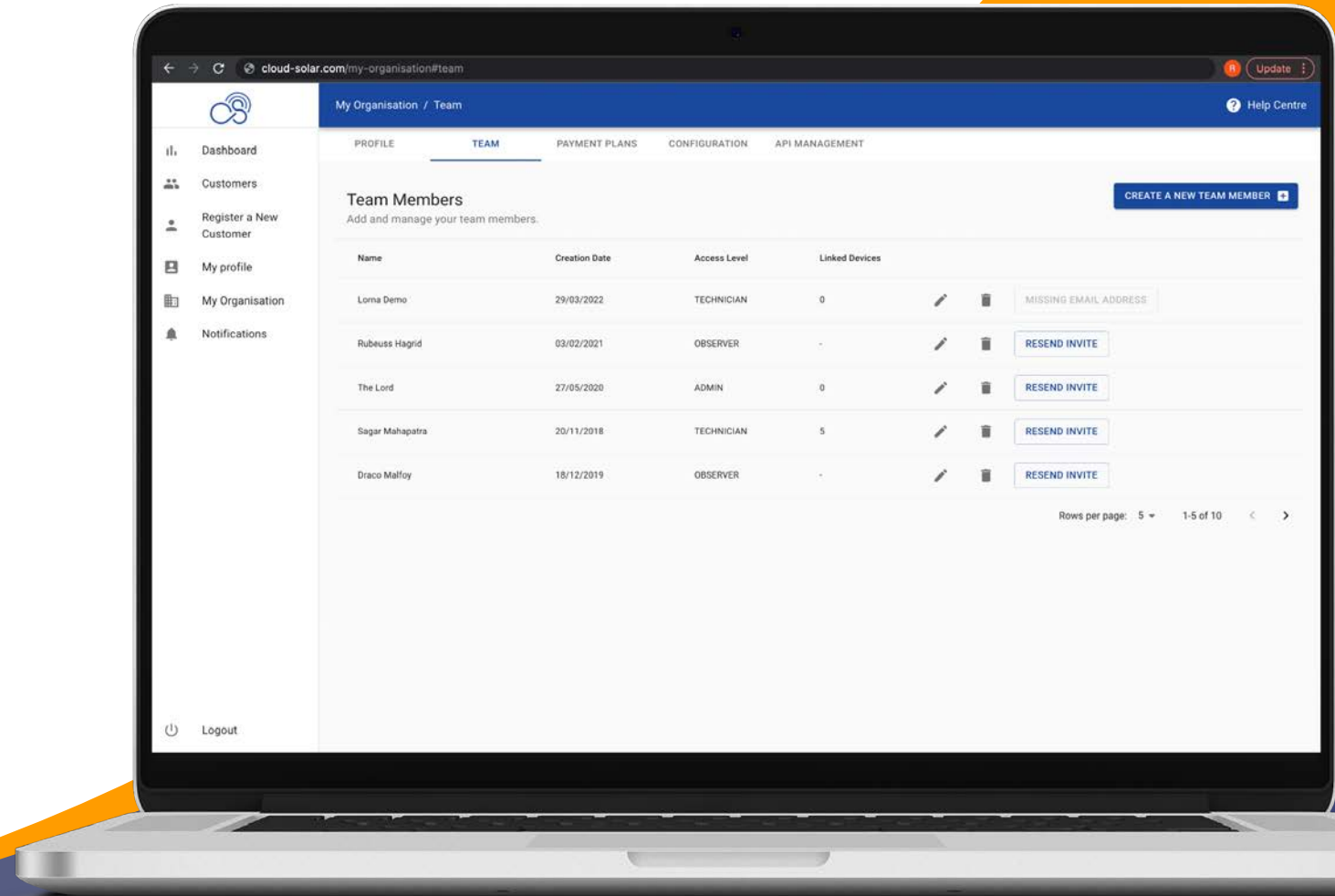


# My Organisation - Team

## Team

If you would like each of your team members to have their own login, you can add them to your team with different access levels.

Find out more about different types of access levels on our [Help Centre](#).

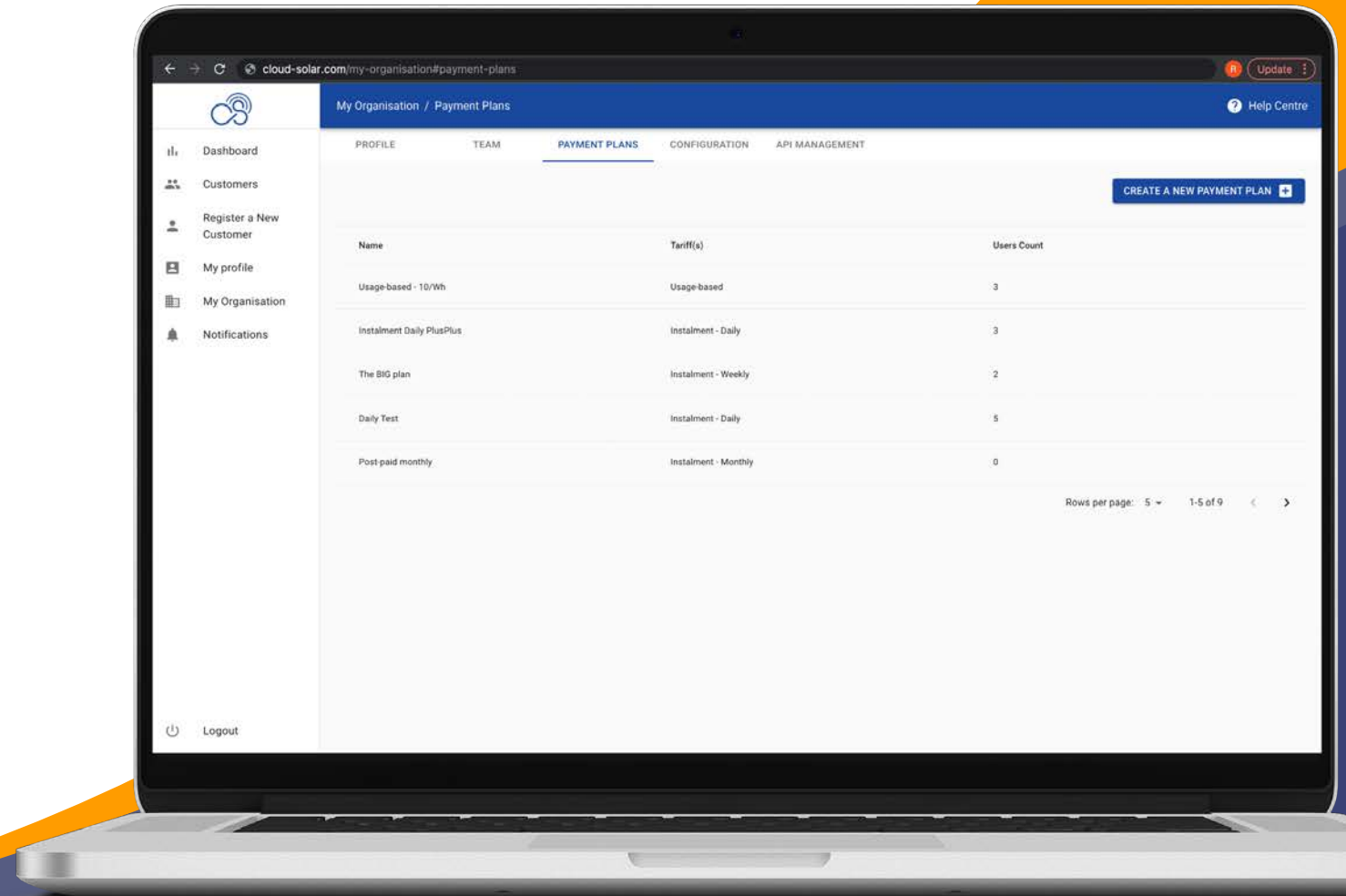


# My Organisation

## Payments

This feature allows you to design payment plans based on your project business model or your customer's needs. These can include time-based payment plans or per-usage type plans, and they are easily assigned to your customers.

The payment platform allows you to record customers' payments, keeping financial records.

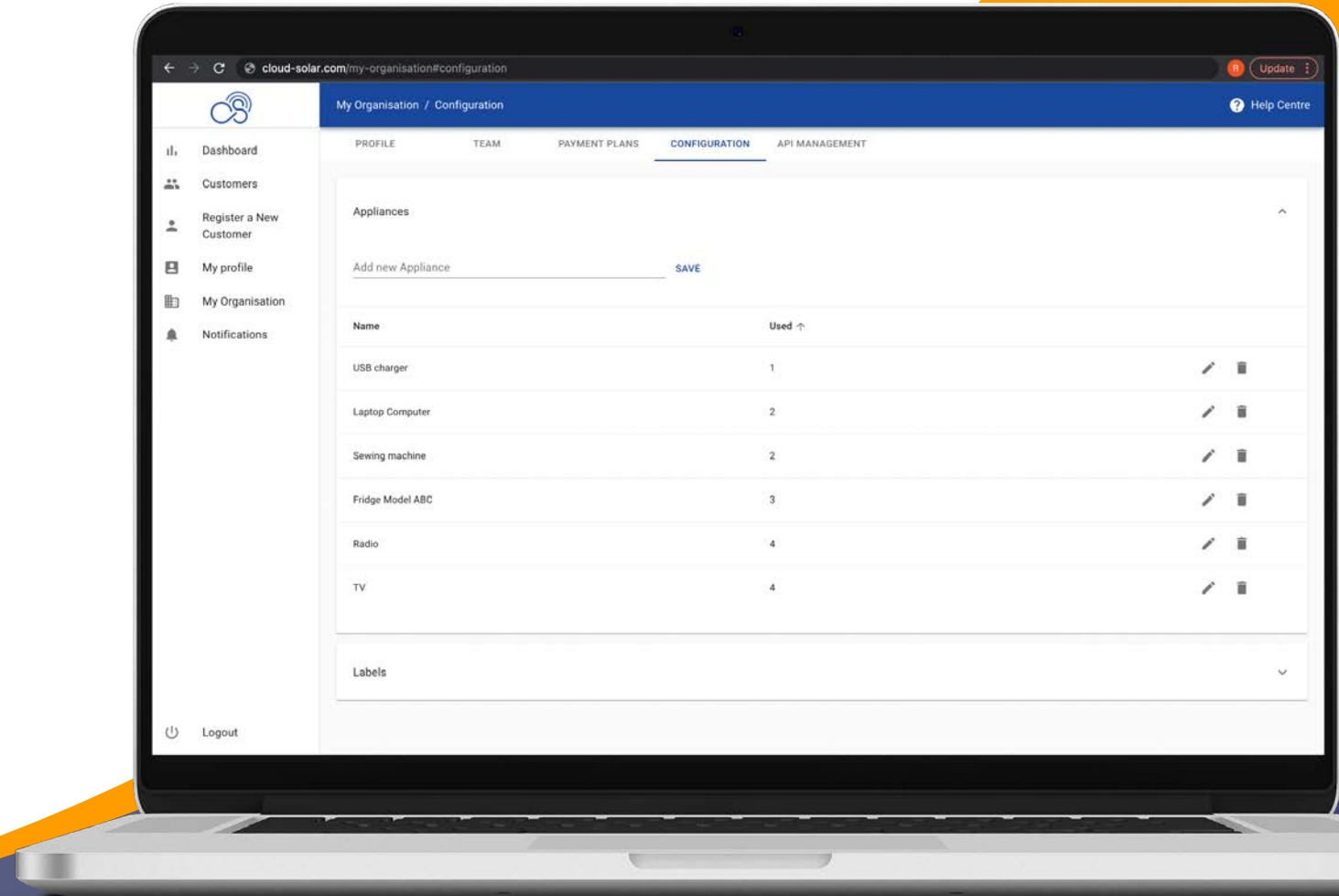




# My Organisation

## Configuration – Appliances

Cloud Solar is used by diverse organisations with many different products, hence, you can add available appliances that your organisation sells or the add ones you need on the platform.



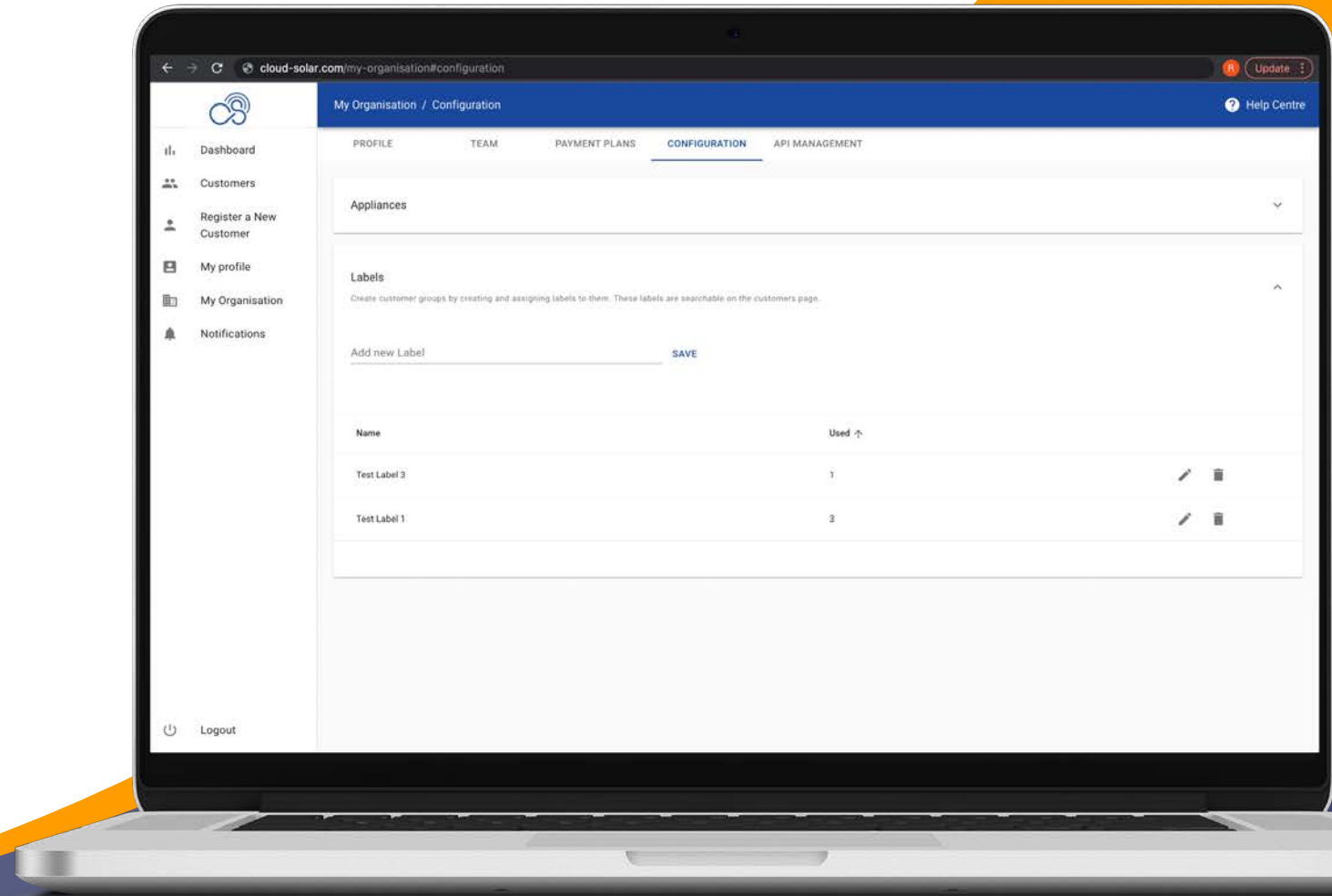
# My Organisation

## Configuration - Labels

You can create customer groups by clustering them together based on similar aspects like battery type, location or whatever label suits you best for that group.

In order to optimise searching, you can then search for these customers by the label name of the group on the customer page.

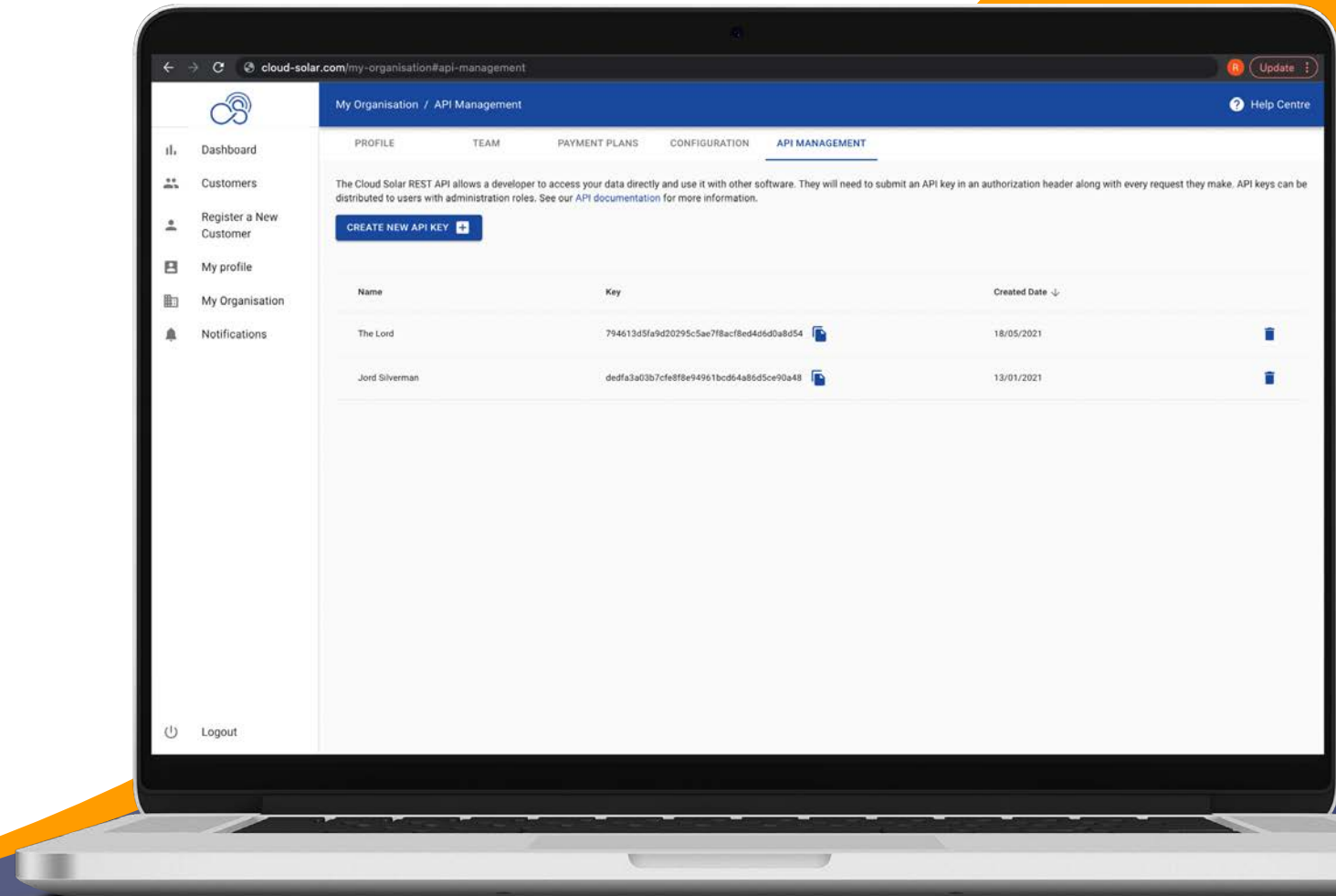
You can also filter customers based on labels.



# My Organisation

## API Management

The Cloud Solar REST API allows a developer to access your data directly in order to use it with other software. They will need to submit an API key in an authorization header along with every request they make.



# Notifications

If your organisation has notifications enabled, the administrator will see a notifications tab in the sidebar menu. This displays a list of notifications that have been sent to your customers. They will receive a message either via email or SMS depending on their contact preference.

Your customers will receive notifications when:

1. A payment is made.
2. They are running low on credits.
3. They have reached 50% or 100% ownership of their solar system.
4. Their load output is enabled or disabled because they have ran out of credit or manually from the data page.

