



# **HiPortal® Monitoring System**

## **Guidebook for Account Level Management**

HYPONTECH SERVICE DEPARTMENT

## **OVERVIEW**

This manual aims to explain the account-level management aspects of the V2.0 version of the WEB HiPortal monitoring system. Details of HiPortal registration will no longer be introduced.

All users are set default with an End-user account when registering a HiPortal account.

If the following instructions cannot effectively help you solve issues associated with account-level management, you are advised to contact Hypontech Service Department directly.

Please use the following QR Code and link for HiPortal access.



**HiPortal APP** 



**HiPortal WEB** 

v2.hyponportal.com

## PART 1 Installer Account

### **Become An Installer Account**

i. User has registered HiPortal account

HiPortal Hypontech PV Monitori	ng Platform	Dashboard Mode     Message >     English >	r 224@qq.com
Pilot View 🗧			Setting
→ Plant Management	Your Account		Help
Add New Plant Overview		Account: 430616224@qq.com	Logout
Device management     Inverter     Gateway	Setting	Account Level: E End User Your E ID 00242 is :	
	Security	As End User user, you have the limited access of the system. For detail authority list, please click here My Installer:	

### Figure 1. Account Page of End-User

- Log in to your HiPortal account. Click setting in the drop list on upper right coner. You can check the End-User ID of your account as shown in the red box above.
- You could contact Hypontech Service Department with your HiPortal account name (email), or simply provide us the ID number. Our service engineers could upgrade your account from End-User to an Installer Account.

### ii. User has NOT registered on HiPortal yet.

- > Method 1: Please provide your email to your registered distributor, who can help you to register an installer account.
- > Method 2: If you do not have a registered distributor yet, you could give your email to Hypontech Service Department.

# Becoming an installer account means you will have access to User Management function, which will appear on the menu on HiPortal Web.

You have authority to manage the End-User accounts who are bound under your account.

HiPortal Hypontech PV Monitor	ing Platform	Dashboard Mode Message V English V	Installer 清蒸一郎 <sup>~</sup>
Pilot View 💽			Setting
✓ Plant Management	Backstage		Help
Add New Plant Overview	User Management		Logout
✓ Device Management Inverter	Roles	Users By ID V Search 2 + Add Na	lew User
Gateway	End-User		
✓ Backstage		Account Register E-mail/Mobile Phone N	More
<ul> <li>Maintenance</li> </ul>		No Data	

### Figure 2 Installer Account - Function Panel Overview

- > In yellow box 1 above, click Setting to see the Installer ID
- Click "User Management" in the yellow box 3 to access interface. The information of end-users bound to this account will be displayed here

### How to bind End-User account

In the case one of your end user has not registered a HiPortal account, you could register the account for the end user and bind it to your installer account.

B1. The installer account binding new user who has not registered HiPortal account

HiPortal Hypontech PV Monitori	ing Platform		Dashboard N	Node Message ~	English $\vee$	● Installer 清蒸一郎 <sup>×</sup>
Pilot View ← Plant Management Add New Plant Overview	Backstage User Management					
✓ Device Management Inverter Gateway	Roles	Users By ID	~ )		Search	2 + Add New User
<ul> <li>Backstage</li> <li>User Management</li> <li>Maintenance</li> </ul>		•	Account	Register E-mail/Mobile	Phone	More
Log						



Step 1: Click "User Management" at yellow box 1 shown above, and the right interface will appear. Click "Add New User" at yellow box 2, and the following interface will pop up:

	-	_	Add New User	×			
ement	1	New User E-r	mail				
=	2	8B1dtsJh	đ				+ Add New User
		Bind Under	I V 001	76		Search	
		Role	End-User	~	Register E-mail/Mobile	Phone	More
			Create		No Data		
			Cancel				
	_				- 10 C		



- Step 2: Enter the customer's e-mail address in yellow box 1, and the password for logging in to HiPortal will be automatically generated as yellow box 2 showing, and the account will be automatically bound to the installer account;
- > The generated password will also be sent to this e-mail address, and user can directly log in with e-mail address and password.

### In case the customer has registered as an End-User account on HiPortal

B2. The end user can complete the binding by adding the ID of the installer account

HiPortal Hypontech PV Monit	oring Platform	Dashboard Mode Message V English V English 1	i ar 224@qq.com <sup>×</sup>
Pilot View			Setting
<ul> <li>✓ Plant Management</li> </ul>	Your Account		Help
Add New Plant Overview		Account: 430616224@qq.com	Logout
<ul> <li>✓ Device Management</li> <li>Inverter</li> </ul>	Setting	Account Level: E End User 2 Your E ID 00242	
Gateway	Security	As E End User user, you have the limited access of the system. For detail authority list, please click here My Installer: I Confirm	

Figure 5. B2 Step 1

- > Customer need to log in using his/her own End-User account on the HiPortal.
- In yellow box 1: Click Setting and enter installer account ID in "My Installer" at yellow box 3, and then click Confirm. Or:

Provide us with your End-User ID as shown in yellow box 2, and we will help you complete the binding.

### **User Management as Installer Account**







### Figure 7. User Management – Installer Account Panel

- Click on yellow box 2 below to see all end users bound to the installer account
- Click on yellow box 3 below to see the detailed information of the End-User account

#### What Installer account can do:

- 1) Creating solar plant, adding device.
- 2) Help customers who have not registered a HiPortal account to register.
- 3) If the **End-User** account has been bound to your Installer account, all the solar plants under the **End-User** accounts are visible for your installer authority, including management and configuration.
- 4) You can actively bind or unbind your account from a Wholesaler.

HiPortal Hypontech PV Monitor	ing Platform		Das	shboard Mode	🛑 Message 🗸	English $\vee$	•	<mark>↓</mark> 00176 清蒸一郎 <sup>~</sup>
Pilot View ← ✓ Plant Management	Your Account							
Add New Plant Overview Y Device Management	Setting	Account:	328628645@qq.com	Your 🚺 ID	00176			
Inverter Gateway 🌱 Backstage	Security		As <b>1</b> Installer user, you have the imited access of the system. For tatul authority, list observe click here	<b>is :</b> Tell end users to li. this ID in the syste	nk to your account by enten m.	ing		
User Management Y Maintenance Log		My Distributor:	W Confi	irm				



HiPortal Hypontech PV Monitor	ing Platform	Dashboard Mode Message ~ English ~	<mark>1</mark> 00176 清蒸一郎 <sup>~</sup>
Pilot View 🗧			Setting
✓ Plant Management	Your Account		Help 🕐
Add New Plant Overview		Account: 328628645@qq.com	Logout
V Device Management	Setting	Account Level: 1 Installer Your 1 ID 00176 is :	
Gateway V Backstage	Security	As I Installer user, you have the Tell end users to link to your account by entering limited access of the system. For detail authority list, please click here this ID in the system.	
Vser Management V Maintenance Log		My W 0 0 0 4 6 Unbind Distributor:	

Figure 9 Installer Account Bound to Wholesaler

## PART 2 Wholesaler / Distributor Account

## A. Become a Wholesaler account

### All enquiries about becoming a Wholesaler Account require written authorization from Hypontech.

- > After authorization, Hypontech can help you create a Whole-Saler account with the e-mail address you provided.
- > The account will automatically generate a password, which will be sent to the e-mail address provided.
- > You can log in to the HiPortal App or Web directly through this email and the password (v2.hyponportal.com)
- If you have registered Hiportal as a End-User account before, provide your e-mail or account ID for Hypontech, leave the rest to us.

## B. User Management of Wholesaler Accounts



Figure 10. User Management – Wholesaler, Installer & End-Users

HiPortal Hypontech PV Monitorin	ng Platform		Dashboard	Mode Message 🗸	English ~
Pilot View 💽		Add New User	×		
✓ Plant Management	Backstage				
Add New	User Management	New User E-mail			
Plant Overview	Roles	2rGGvW2J			Search + Add New User
Gateway ✓ Backstage	End-User			Register F-mail/Mohile	Phone More
User Management	Installer	Role End-User	~		
✓ Maintenance			Create	ocaizhao@163.com	
Log			Cancel		

### Figure 11. User Management - Wholesaler

#### What Wholesaler account can do

- 1) Creating plant, adding device
- 2) Help customer to create HiPortal account, and can create two levels of accounts for end users and installers

### **ATTENTION**

When helping customer to create an **End-User** account, this account MUST be bound to an **Installer Account** under **Wholesaler Account** at the same time so the plant remains visible to Wholesaler account.

When an **Installer Account** is created through a **WholeSaler Account**, the **Installer Account** will be automatically bound to **Wholesaler Account**.

After the **Installer Account** is bound to the **Wholesaler Account**, the **Wholesaler Account** can view and manage all solar plants under the Installer account

#### What Wholesaler CANNOT do:

1) As a **Wholesaler Account**, you CANNOT directly bind an **End User** account to your account. That is, cross-level binding is not allowed.

## PART 3 Transfer Solar Plant

## Transfer your solar plant to any account

When installing multiple solar plants as an installer or distributor, instead of logging into the owner's account and create a plant

then log into another, it would be much easier to create multiple solar plants in our own account directly, then transferring

### them to the plant owner's account.

Only when we ensure that these solar plants are operating normally, we will transfer them to the end users. **Transfer function** is designed for this scenario.



Figure 12. Transfer solar plant 1

HiPortal Hypontech PV Monitor	ing Platform	Dash	board Mode	Message ~ Englis	sh ~ 💽 💓 00219 wholesaler	@hypontech.com $\scriptstyle$
Pilot View       €         ✓ Plant Management       Add New         Add New       Plant Overview         ✓ Device Management       Inverter         Gateway       Gateway	Environmenta Transfer Plant	Plant     Plant     Ir     市场発展計用	urrent Owner: E 00223 ncluding: nverter 1 nateway 1 TRANSFER	× ne	Last Update: Au Online 1 Warning 0	25 2020 14:08 🗘
<ul> <li>Backstage</li> <li>User Management</li> <li>Maintenance</li> </ul>	Map View TO Status 🗢 Plants	W I Power[W] \$	E-Today[kWh] 🗇	E-Total[kWh] 🗘	Last Update 🗢	••• Detail View
Log	●● + ● 市场测试用 ●● Normal ●● Offline ●● Offline	more devices have warning.	26.0	567.0	2020-08-25 14:06:25	

Figure 13. Transfer solar plant 2

As shown in Figures 12 and 13, when you want to transfer a solar plant, you need to enter the ID of the account for the plant to be

transferred. The ownership of the solar plant will be transferred immediately.

### ATTENTION

The transfer can only be carried out in the form of a solar plant, and the transfer of device is not supported.

## After the solar plant is transferred, can I still see it?

Visibility of the plant after transfer could differ from case to case, depending on account binding relationship of

"transferrer" and "receiver".

A. Receiving account bound UNDER transferring account (e.g. End-User receiving from his/her Installer)

With ownership transferred to the receiving account, the visibility of solar plant will still be available for the

transferring account

B. Receiving account bound ABOVE transferring account / Accounts NOT bound to each other

With ownership transferred to the receiving account ABOVE your account, or not bound to your account, the visibility of solar plant will NOT be available for the transferring account until binding relationship is built.