

Chapter 2: Customer Setup

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Introduction

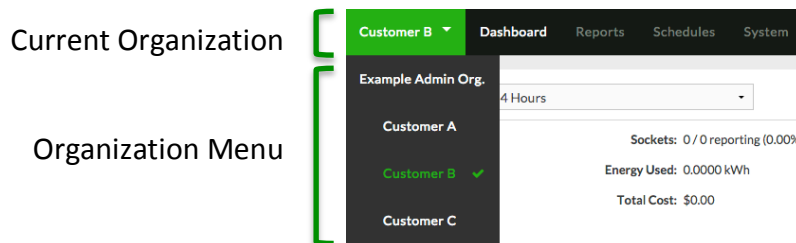
Customer setup is Chapter 2 of the installation tutorial. If you have not done so already, please read Chapter 1: *Installation Overview* before continuing.

Customer setup involves IntelliNetwork administration tasks, and requires appropriate system administration privileges. If you are not a system administrator, please continue to Chapter 3: *Field Installation Preparation*.

Create the customer organization

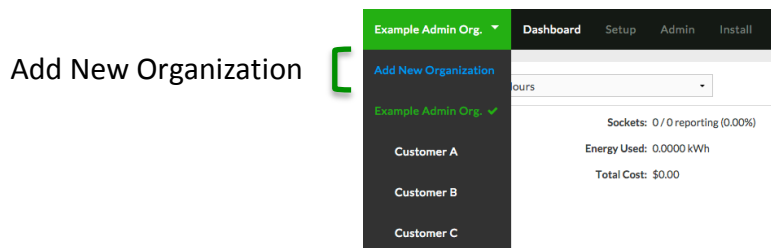
Before an installation can start, a new customer **organization** must be created on Ibis Networks' web application, the **IntelliNetwork (ibis.io)**. An organization specifies information about the customer, provides a container for all of the customer's data, and specifies which ibis.io users may access this data.

Begin by logging in to ibis.io using the account credentials provided to you by Ibis Networks. Once you have logged in, the name of your **current organization** will be shown at the top-left corner of the page. All of the information the application displays pertains to the current organization. To see information from a different organization, move your mouse over the organization name. This will display the **organization menu**, which can be used to switch between organizations.



In order to create a new organization, you will need to set the current organization to your **administrative organization (admin org)**. This is a special organization that allows you to administer all of your customer installations. Your admin org will be at the top of the organization menu (*Example Admin Org.* in the above figure).

Once you have switched to the admin org, the organization menu will have an additional link: **Add New Organization**. Click this link to begin creating the customer organization.



If you do not see the Add New Organization link, you either aren't in your admin organization, or you don't have the required permissions to create organizations.

After clicking the Add New Organization link, you will be redirected to the **Organization Setup** page where you can set the new organization's attributes:

Name: Customer E Mode: Normal Flags: Active Allow Sub-Organizations

Note:

Address:

Calendar: Federal Holidays View Pricing: Hawai'i Flat Rate (\$.30/kWh)

Time Zone: (GMT-10:00) Hawaii Core Start Time: Core End Time: Use core hours

Days to Keep Minute Data: 45 Days to Keep Packets: 1 Truncate old data

[Cancel](#) or [Create](#)

Initially, it is only required that you set the organization's **Name** and **Time Zone**. The Name is usually set to be the customer's company name, and the Time Zone must match the customer's time zone. Detailed information on the other organization attributes can be found in the *InteliNetwork: System Control* manual.

Once you have set the attributes appropriately, click the **Create** button and the new organization will be constructed.

Set up technician ibis.io accounts

Once the customer's organization has been made, you are ready to create ibis.io accounts for your field technicians and add them to the customer's organization. Field technicians are the people who will physically install the InteliGateways and InteliSockets. We recommend having two technicians do the field installation: one person to physically plug in the InteliSockets while the other configures the sockets.



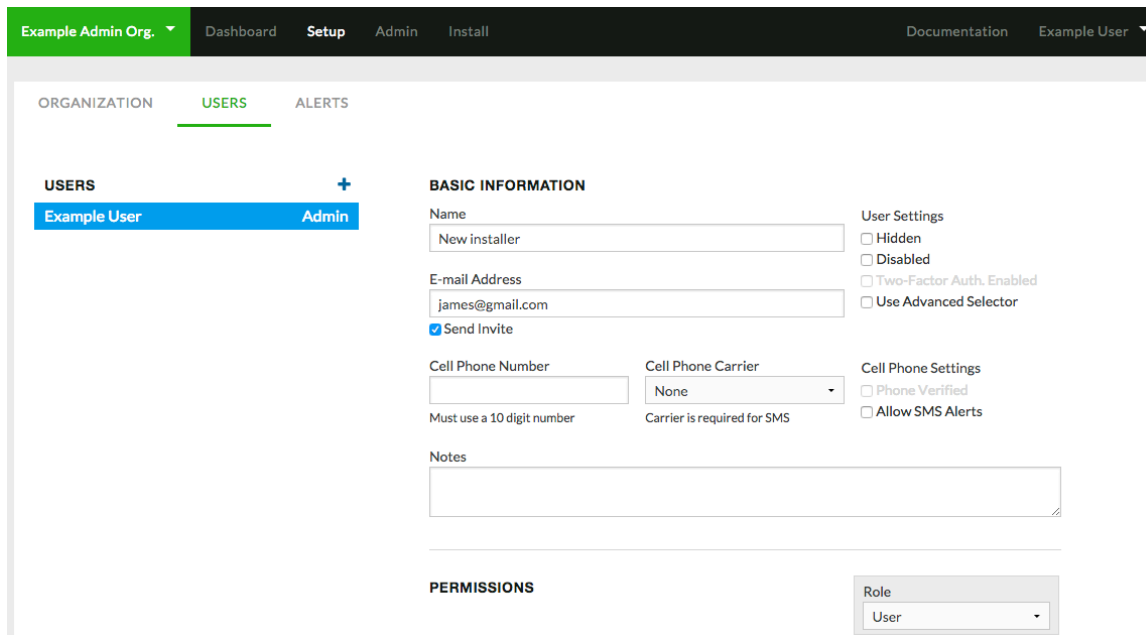
Due to the configuration process, if multiple groups of technicians want to install at the same time they will have to be installing in different buildings (to prevent each group's installation hardware from interfering with each other). It is recommended to just have one group installing at a time.

If you will be the only technician doing the field installation, skip to *Chapter 3: Field Installation Preparation*, since your account is already set up to support the field installation.

Create additional technician accounts

Every field technician needs an account on ibis.io. If any of your technicians do not have an account, you may create accounts by following these steps:

1. Navigate to your admin organization using the organization menu.
2. Navigate to the **Setup** tab.
3. Navigate to the **Users** sub-tab.
4. Click the **+** button to add a new user.
5. Enter the technician's **Name**, **Email address**, and make sure the **Send Invite** checkbox is checked.
6. Click **Save** at the bottom of the form.



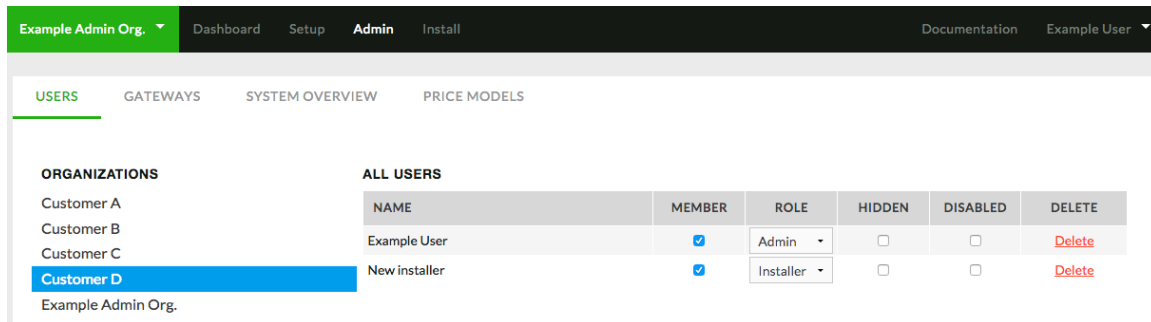
The screenshot shows the Ibis Networks admin interface. At the top, there is a navigation bar with 'Example Admin Org.' (selected), 'Dashboard', 'Setup', 'Admin', and 'Install'. On the right, there are links for 'Documentation' and 'Example User'. Below the navigation bar, there are three tabs: 'ORGANIZATION', 'USERS' (selected), and 'ALERTS'. On the left side, under 'USERS', there is a list with 'Example User' and 'Admin', and a '+' button. The main content area is titled 'BASIC INFORMATION' and contains several form fields: 'Name' (with 'New installer' entered), 'E-mail Address' (with 'james@gmail.com' entered), 'Send Invite' (checked), 'Cell Phone Number' (empty), 'Cell Phone Carrier' (dropdown menu with 'None' selected), 'Notes' (text area), 'User Settings' (checkboxes for 'Hidden', 'Disabled', 'Two-Factor Auth. Enabled', and 'Use Advanced Selector'), and 'Cell Phone Settings' (checkboxes for 'Phone Verified' and 'Allow SMS Alerts'). At the bottom, there is a 'PERMISSIONS' section with a 'Role' dropdown menu set to 'User'.

The technician will receive an email invitation with instructions for finalizing their ibis.io account. You don't have to wait for the technician to finalize their account before beginning the next step; you should add the technicians to the customer organization immediately.

Add technicians to the customer organization

Because the technician accounts were created from within your admin organization, the technicians are now **members** of the admin organization. However, they are not yet members of the customer's organization. Add the technicians to the customer's organization by following these steps:

1. Navigate to your admin organization using the organization menu.
2. Navigate to the **Admin** tab.
3. Navigate to the **Users** sub-tab.
4. Select the appropriate customer organization from the left-side **Organizations** list.
5. Check the **Member** box next to the technician accounts you want to add to the organization.
6. Set each technician's account's **Role** to **Installer**. This gives the technician access to the Install tab, which will be utilized during the field installation.



ORGANIZATIONS	ALL USERS	MEMBER	ROLE	HIDDEN	DISABLED	DELETE
Customer A	NAME					
Customer B	Example User	<input checked="" type="checkbox"/>	Admin	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Customer C						
Customer D	New installer	<input checked="" type="checkbox"/>	Installer	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Example Admin Org.						

The technician accounts will now be members of the customer's organization. This will allow them to access the organization and prepare for the field installation.