



ChargePoint Partner Connect

User Guide

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Introduction to ChargePoint Partner Connect 1

ChargePoint Partner Connect is your portal to accessing your ChargePoint work orders in order to successfully manage assigned tasks and complete it within allotted SLA's. This is your gateway to successfully handle tasks as assigned.

Log into ChargePoint Partner Connect

Enter your log in credentials and click **Log in**.



Log in

[Forgot password?](#)

Don't have an account? [Sign Up](#)

You will be directed to the Partner Portal **Home** page. Click **Work Orders** tab. To know more, see chapter [Work Order Overview](#).

ChargePoint Channel Partner Program

Welcome to ChargePoint Partner Connect!

Register opportunities, manage pipeline, MDF, get documentation and training.



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This link requires a separate login. New users can refer to our [guide](#) for setup, order management, and navigation.

Partner Portal Tab Names	Description
Home	This is the portal authentication landing page providing general ChargePoint assignment data.
Work Orders	This page displays all assigned Work Orders after allocation.
Field Technician Management	This page is for onboarding and offboarding technicians or contractors who have successfully completed certification and micro-credential requirements.
Dashboard	This page is currently under maintenance.
Library	This is your resource library of brochures, guides, data sheets, branding guidelines and more.
Chargepoint University	This page provides access to the ChargePoint certification page, both AC/DC and micro-credentials.

Work Orders Overview 2

The **Work Orders** page provides a comprehensive list of all work orders assigned. Each entry contains essential information, including the work order number, subject, current status, and the date of assignment, ensuring clear visibility and effective tracking of responsibilities.

Work Orders
My Open Work Orders

9 items - Sorted by Work Order Number - Filtered by My work orders - Status - Updated a few seconds ago

Search this list...

Wo...	Case	Subject	Account	Service Territory	Status	WO Assigned ...	Entitlement	Appoin...	Work Type
1	20107925	15576... Assure - CT4020-HD O6 He...	Ohio State University	Ohio - Columbus Metro	In Progress	2/13/2026 2:55 P...	Repair SLA Assure	3/5/2026 ...	CT4 Wiring Verification...
2	20108310	15599... Assure-CT4020-HD-GWIV1...	NORTHCENTRAL ELECT...	Mississippi - Gulfport Me...	In Progress	2/20/2026 2:05 P...	Repair SLA Assure	3/3/2026 ...	CT4 Sim Card Replace...
3	20109099	14571... Assure-250 -WAGO Block -...	The Local Market	Tennessee - Knoxville M...	In Progress	3/3/2026 3:12 PM	Repair SLA NonAssure	3/11/202...	250 WAGO Block Repl...
4	20109395	15548... Assure-CPE250C-500-CCS...	City of Newark Ohio	Ohio - Columbus Metro	In Progress	3/6/2026 3:50 PM	Repair SLA Assure	3/19/202...	250 Charging Cable Re...
5	20109564	15630... Assure-CT4020-HD-GWIV1...	City of St Marys	Ohio - Dayton	In Progress	3/10/2026 4:36 P...	Repair SLA Assure	3/18/202...	CT4 Head Replacement
6	20109799	15658... Assure - CT4020-HD-GW - ...	The Foundry	Ohio - Columbus Metro	In Progress	3/13/2026 2:59 P...	Repair SLA Assure	3/24/202...	CT4 Head Replacement
7	20109907	15599... Assure - CT4020-HD-GW-Ju...	Children's Healthcare of...	Georgia - Atlanta Metro	Shipped	3/16/2026 4:22 P...	Repair SLA Assure		CT4 Power Manageme...
8	20109951	15686... Assure - CPE250 - PM repla...	Bob King Mazda Hyundai	North Carolina - Greens...	Shipped	3/17/2026 11:13 ...	Repair SLA Assure		250 Power Module Re...
9	20109993	15694... Assure-CT4020-HD2-GWL...	Primerica, Inc.	Georgia - Atlanta Metro	In Progress	3/17/2026 5:04 P...	Repair SLA Assure	3/19/202...	CT4 Wiring Verification

The key columns for a Work Order tracking system are as follows:

Column Name	Description
Work Order Number	Unique identifier for each work order. Needed when contacting support.
Case	Case number used for communication between ChargePoint and the customer.
Subject	Brief description including type of work and station model.
Account	Name of the account.
Service Territory	Location where the service needs to be performed.
Status	Current status of the work order.
WO Assigned Date	Date when the work order was assigned.
Entitlement	Type of service or warranty associated with the work order.
Appointment Date	Scheduled date and time for the service or task.
Work Type	Nature of the task (repair, installation, commissioning). This allows technicians to identify the type of job at a glance, helping with preparation and planning

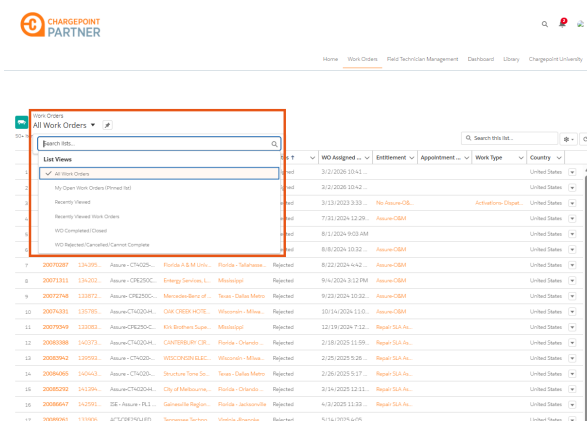
Filter and Sort Work Orders 3

This page helps you manage work orders efficiently by using filters and sorting options. Filters at the top of the work orders list let you view categories such as all work orders, your open work orders, recently viewed, completed/closed, or rejected/cancelled items, and you can pin a preferred filter to make it your default view.

Filter Work Orders

At the top of the work orders list, you will see filter options. To filter work orders, perform the following steps:

1. Navigate to the top of the work orders list to access the filter options in the application.
2. Click the drop-down arrow located beside the work order filter title. The following are the list of available categories. Choose the appropriate filter category.
 - All Work Orders
 - My Open Work Orders
 - Recently Viewed
 - Recently Viewed Work Orders
 - WO Completed / Closed
 - WO Rejected / Cancelled / Cannot Complete





NOTE: Depending on the selected filters, the key columns change accordingly

- To designate the selected filter as your default view, click the pin icon next to the filter. Once pinned, the selected filter is applied automatically, and all work orders are displayed according to this default configuration.



Sort Work Orders

You can sort the work orders using the column headers in the work order table by performing the following steps:

- At the top of the work orders table, identify the column headers. Each header represents a category (Example: WO Assigned Date, Status, Priority).

Work Orders
My Open Work Orders  

11 Items - Sorted by Status - Filtered by My work orders - Status - Updated 20 minutes ago

Q Search this list...  

Work Order ...	Case	Subject	Account	Service Territory	Sta...	WO Assigned D...	Entitlement	Appointment d...	Work Type	
1	20091132	145996...	Multifamily - CPF25-Latch Re...	PCS Gridtech,LLC	Florida - Jacksonville	Shipping	10/29/2025 4:06 PM	Repair SLA NonAssure	CPF Latch Replacem	
2	20091134	145996...	Assure - CPF25 - Latch Replac...	Zen Terrace	Florida - Jacksonville	Shipping	10/29/2025 4:41 PM	Repair SLA NonAssure	CPF Latch Replacem	
3	20091255	145997...	Assure - CT4k - station replace...	Diole Power	Florida - Jacksonville	Shipping	12/17/2025 12:14 ...	Repair SLA Assure	12/17/2025 10:00 ...	CT4 Head Replacem
4	20088831	125377...	NACS - ChargePoint Activatio...	Kriete Group	Wisconsin - Milwaukee	Shipped	5/7/2025 4:13 PM	Repair SLA NonAssure	250 NACS Installati	
5	20090736	145306...	Assure - CT4020HD-GW (Ve...	Carrier Corporation	Florida - Miami Metro	Shipped	6/4/2025 7:02 PM	Repair SLA Assure	CT4 Head Replacem	
6	20090489	145579...	Assure-CPE250C-500-CCS1-...	Seven States Power Co...	Tennessee - Nashville ...	In Progress	6/2/2025 9:32 AM	Repair SLA Assure	250 Fan Tray Assem	
7	20090627	145336...	Assure - CT4020HD-GW - He...	The Point at Town Cen...	Florida - Jacksonville	In Progress	6/4/2025 7:25 AM	Repair SLA Assure	CT4 Head Replacem	
8	20090641	145305...	Assure - CT4010HD-GW - He...	Kohl's	Florida - Orlando Metro	In Progress	6/4/2025 9:29 AM	Repair SLA NonAssure	CT4 Head Replacem	
9	20091163	145957...	WO 20091163 - CT4K Install	Wood Partners	Arizona	In Progress	11/5/2025 2:14 PM		11/6/2025 12:00 P...	CT4 Installation
10	20091164	145957...	CT4K Installation - WO 2009...	Wood Partners	Arizona	In Progress	11/6/2025 7:18 AM			CT4 Installation
11	20091185	145995...	PL2 Replace Door Fan	Chargepoint, Inc.	Florida - Miami Metro	In Progress	11/24/2025 9:18 AM	Repair SLA Assure	11/26/2025 12:00 ...	PL2 Replace Door F

- Click the column header corresponding to the category by which you want to sort the work orders. For example: To sort by assignment date, select the **WO Assigned Date** header.

The table automatically reorders based on the selected column. If the WO Assigned Date header is selected, the table displays work orders sorted by the most recent assignments.

- To sort by a different category, repeat Step 2 with another column header. The table updates accordingly.

Review and View Work Orders 4

In the Partner Portal application, work orders can be reviewed and tracked through clearly defined statuses such as Assigned, Ship to, Parts Ordered, Shipping, Shipped, In Progress, On Hold, Completed, Closed, or Cannot Complete, each reflecting the stage of progress or challenges faced.

Review and Understand Work Order Status

Status	Description
Assigned	Work order has been allocated but not yet acted upon.
Ship to Received	ChargePoint has received the shipping address and now needs to place an order for parts.
Parts Ordered	Parts needed for the work order have been ordered.
Shipping	Parts are pending fulfillment or partially fulfilled.
Shipped	Parts are shipped and are on their way.
In Progress	Work order is currently in progress. or If parts are required, they have been delivered. The Work Order is currently in progress.
On Hold	The work order is temporarily on hold, awaiting further action.
Completed	The assigned scope of work has been completed, and all deliverables have been provided.
Closed	The work order has been completed successfully, as confirmed by ChargePoint.
Cannot complete	The work order cannot be accepted or executed.

View Work Order Details

To view the work order details, perform the following steps:

1. On the **Work Orders** page, click the specific **Work Order Number** you want to view.

Work Orders
My Open Work Orders

11 Items - Sorted by Status - Filtered by My work orders - Status - Updated a minute ago

Search this list...

Work Order	Case	Subject	Account	Service Territory	Sta.	WO Assigned D.	Entitlement	Appointment d.	Work Type
1	20091132	145996...	Multifamily- CPF25-Latch Re...	PCS Gridtech,LLC	Florida - Jacksonville	Shipping	10/29/2025 4:06 PM	Repair SLA NonAssure	CPF Latch Replacem
2	20091134	145996...	Assure - CPF25 - Latch Replac...	Zen Terrace	Florida - Jacksonville	Shipping	10/29/2025 4:41 PM	Repair SLA NonAssure	CPF Latch Replacem
3	20091255	145997...	Assure - CT4K - station replace...	Dixie Power	Florida - Jacksonville	Shipping	12/17/2025 12:14 ...	Repair SLA Assure	CT4 Head Replacem
4	20088831	125377...	NACS - ChargePoint Activatio...	Klete Group	Wisconsin - Milwaukee	Shipped	5/7/2025 4:13 PM	Repair SLA NonAssure	250 NACS Installati
5	20090736	145306...	Assure - CT4020HD-GW (Ver...	Carlier Corporation	Florida - Miami Metro	Shipped	6/4/2025 7:02 PM	Repair SLA Assure	CT4 Head Replacem
6	20090489	145579...	Assure-CPE250C600-CCS1...	Seven States Power Co...	Tennessee - Nashville ...	In Progress	6/2/2025 9:32 AM	Repair SLA Assure	250 Fan Tray Assem
7	20090627	145336...	Assure - CT4020HD-GW - He...	The Point at Town Cen...	Florida - Jacksonville	In Progress	6/4/2025 7:25 AM	Repair SLA Assure	CT4 Head Replacem
8	20090641	145305...	Assure - CT4010HD-GW - He...	Kohl's	Florida - Orlando Metro	In Progress	6/4/2025 9:29 AM	Repair SLA NonAssure	CT4 Head Replacem
9	20091163	145957...	WO 20091163 - CT4K Install	Wood Partners	Arizona	In Progress	11/5/2025 2:14 PM		CT4 Installation
10	20091164	145957...	CT4K Installation - WO 2009...	Wood Partners	Arizona	In Progress	11/6/2025 7:18 AM		CT4 Installation
11	20091185	145995...	PL2 Replace Door Fan	Chargepoint, Inc.	Florida - Miami Metro	In Progress	11/24/2025 9:18 AM	Repair SLA Assure	PL2 Replace Door F

2. Select from the top navigation buttons to take action.

Work Order
20090641

Follow Print Create Service Report

Owner: Mission's Directch_Services Status: In Progress Subject: Assure - CT4010HD-GW - Head Replacement (Ver 08) - 20090641 Case: 14530515

Details Related RMA / PZO Related Collaborate WO Assignment

* Required Information

Description

Work Order Number: 20090641
Entitlement: Repair SLA NonAssure
Subject: Assure - CT4010HD-GW - Head Replacement (Ver 08) - 20090641

Target SLA Date: 6/13/2025 2:00 AM
Customer Service Executive: Jonathan David Rajan
Description: Station-1: Name: AMPCAP / 1327 PALM BAY
Serial Number: 1837x1020161
MAC Address: 0026-8100-0003-008D
Station Model: CT4010HD-GW
Station Physical Address: 205 Palm Bay Rd NE, Melbourne, Florida, United States - 32904

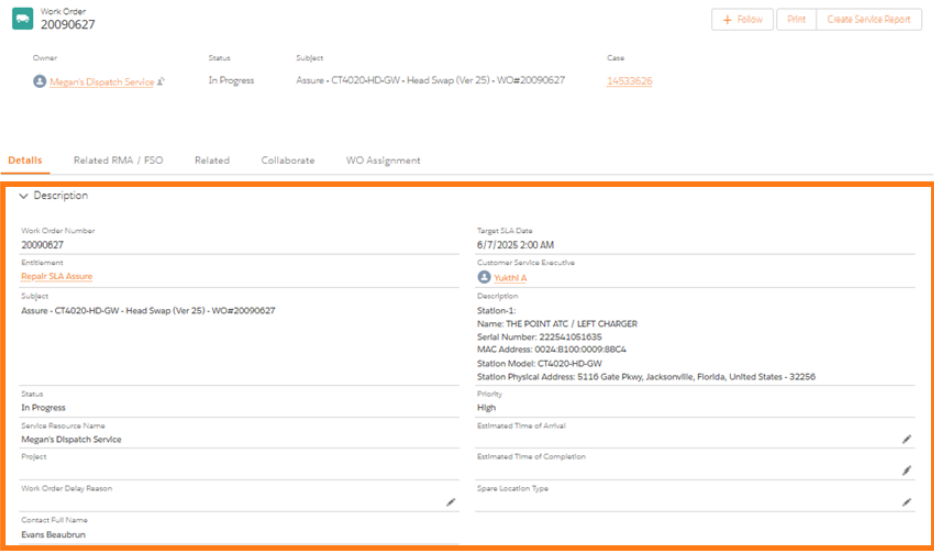
Action	Description
Accept	Select this option to confirm that you have reviewed and formally accepted the work order.
Completed	Use this option once the assigned task is successfully finished. The work order status will be updated to Completed .
Could Not Complete	Select this option if circumstances prevent completion of the task (for example, equipment removal, inaccessible location) or if you are unable to accept the work. The work order status is updated as Could Not Complete .
Request for Assistance	Use this option to request ChargePoint support. For faster responses on the Work Order queries, it is recommended to use the Collaborate tab instead of Request for Assistance .
More Actions	Provides access to additional work order actions if directed by ChargePoint.

Accept a Work Order 5

Accepting a work order in the Partner Portal application involves reviewing all relevant details before formally confirming. You can open the Work Order page, where stations, SLA dates, and delivery timelines are displayed. The Related tab provides scope of work and documents, while Work Order Line Items (WOLIs) outline specific tasks that must be completed in sequence. Attachments under Files should be checked for supporting materials, and the Collaborate tab can be used for clarifications.

To accept a work order, perform the following steps:

- 1. Open the **Work Order** page. This lists the stations associated with the Work Order.



NOTE: The Target SLA Date is automatically updated. If parts are required it will be updated the Estimated Delivery Date is updated, if parts are not required it will be updated based on Entitlement.

2. Click **Related** tab, to view scope of work and associated documents.

- a. Under **Work Order Line Items (WOLI)**, select each work order individually to view the service request.

The screenshot shows a work order interface for Work Order 20090627. At the top, there are buttons for '+ Follow', 'Print', and 'Create Service Report'. Below this, the work order details are displayed: Owner (Megam's Dispatch Service), Status (In Progress), Subject (Assure - CT4Q204HD-GW - Head Swap (Ver 25) - WO#20090627), and Case (14533626). A navigation bar includes 'Details', 'Related RMA / FSO', 'Related' (highlighted), 'Collaborate', and 'WO Assignment'. The 'Work Order Line Items (1)' section is highlighted with an orange border and contains a table with the following data:

Work Order Line Item Number	Work Type	Station	Warranty Type
00000001	CT's Head Replacement	THE POINT ATC / LEFT CHARGER	ChargePoint Assure



NOTE: If there are multiple Work Order Line Items (WOLIs), note that several tasks must be completed at the station. Carefully read the WOLI description and confirm you have all necessary information to perform the task.



NOTE: Ensure that the work must be performed in order of the WOLI number. For example, complete WOLI 1 before completing WOLI 2.

b. Under **Files**, review the attachments for relevant materials.

Work Order 20090627 + Follow Print Create Service Report

Owner: [Megan's Dispatch Service](#) Status: In Progress Subject: Assure - CT40204HD-GW - Head Swap (Ver Z5) - WO#20090627 Case: [14533626](#)

Details Related RMA / FSO **Related** Collaborate WO Assignment

Work Order Line Items (1)

Work Order Line Item Number	Work Type	Station	Warranty Type
00000001	CTx Head Replacement	THE POINT ATC / LEFT CHARGER	ChargePoint Assure

Work Order History (6+)

Date	Field	User	Original Value	New Value
6/6/2025 11:22 AM	Status	Yuhui A.	Shipped	Parts Delivered
6/6/2025 11:22 AM	Status	Yuhui A.	Parts Delivered	In Progress
6/4/2025 6:46 PM	Status	SVC Immigration	Shipping	Shipped
6/4/2025 12:30 PM	Status	SVC Immigration	Ship-To Received	Shipping
6/4/2025 12:04 PM	Status	Megan's Dispatch Service	Assigned	Ship-To Received
6/4/2025 12:04 PM	Shipping Address	Megan's Dispatch Service		

Files (1)

Title	Owner	Last Modified	Size
Image.png	Megan's Dispatch Service	6/4/2025 9:26 AM	112KB



NOTE: If additional input or documents are required, use the **Collaborate** tab to communicate with the Customer Service Executive.

3. Once all the details are reviewed and clarified, click the **Accept** button to accept the work order. This moves the process forward.

4. Enter the shipping information (**Name, Phone Number, Shipping Address** and **Shipping Address**) and click **Save**.

Accept

Accept Work Order

If Shipping Information is not added the WO will not be accepted, remaining in an assigned state

Is Residential?

* Ship to Name

* Ship to Phone Number

* Shipping Party ⓘ

* Does your team require any of the following?

* Shipping Address

* Street

* City

* State/Province

* PostalCode

* Country

Save



NOTE: The above fields are automatically populated. Enter the street address, after which address suggestions will be generated. You can then select the appropriate option rather than manually entering the full details.



NOTE: In the field "**Does your team require any of the following?**", specify whether a Liftgate and Pallet Jack are needed.

5. Enter the travel information.

- a. **Travel Distance:** Enter the total round trip mileage minus the 50 mile round trip which is already covered by the dispatch rate. Review the WOLIs to determine if more than one technician is required for a given task to ensure proper mileage is entered.
- b. **Travel Cost/Mile:** Enter the agreed upon travel cost per contract (SOW).
- c. **Zone:** This is auto-generated based on Service Territory.

Accept

Accept Work Order

* Travel Distance(mi)

* Travel Cost/mile

Zone

6. Click **Submit** to confirm. A success message is displayed confirming that the work order is accepted successfully.



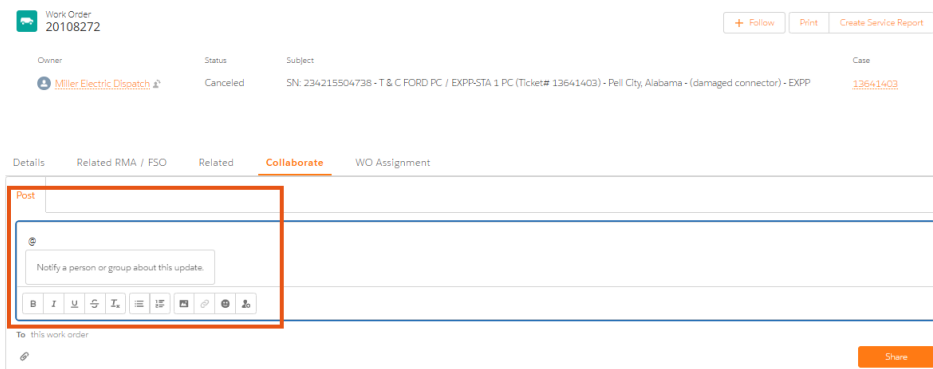
NOTE: Here is a short video, demonstrating how to [Accept a Work Order](#).

Using the Collaborate Tab 6

The Collaborate tab in the Partner Portal application is designed for seamless communication with the team, allowing users to share updates, ask questions, and attach files or pictures related to a work order.

To add comments, perform the following steps:

1. Navigate to the **Collaborate** tab and click **Share an update**.



2. Type @ followed by their name, to Tag the **Customer Service Executive** . This notifies someone in ChargePoint directly.

For example: To request travel outside of the agreed upon rates for the assigned work order, post to @"NA Field Service Team." Tagging this team will notify them immediately, ensuring a faster response.

3. You can also use this tab to add notes and ask questions about the work order. You can also attach files and upload pictures.

Assigning a Technician and Scheduling an Appointment 7

Assigning a technician and scheduling an appointment in the Partner Portal application involves selecting the right personnel and entering key scheduling details. Technicians with the required skills can be assigned directly from the Field Technician list, while those without skills or freelancers can also be assigned by providing an override reason.

Assign a Technician With Skills

To schedule the appointment, perform the following steps:

1. Navigate to the **WO Assignment** to assign a technician.
2. From the **Field Technician** list, select the technician to assign a work order.

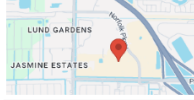


NOTE: The second column shows whether the technician possesses the necessary skill for the work order.

3. Click **Assign To WO** to associate the technician with the work order. A success message is displayed confirming that the work order is successfully assigned to the technician.

4. Navigate to the **Details** tab and access the **Customer Information** section.
 - a. Enter the **Appointment Date**, **Technician Name**, **Phone Number**, **Scheduling Completed** date into the work order.

Customer Information

Account Kohl's Number of Total Stations Number of Site Validations Appointment date	Contact James Wallace Case Contact Email green19900@example.com.invalid Case Contact Phone (321) 952-9480 Address 205 Palm Bay Rd NE Melbourne, Florida 32906 United States 
Technician Name Joe Bradley Technician Name Phone Number 407-276-8065	Scheduling Completed 2/7/2026

5. Click **Save**. The scheduling information is saved.

Assign a Technician Without Skills

To assign a technician that does not have the required skills, perform the following steps:

1. Navigate to the **Work Order Assignment** to assign a technician.
2. From the **Field Technician** list, select the technician to assign a work order.

All times displayed in this partner portal page are in (GMT-06:00) Central Standard Time (America/Chicago)

Work Order 20090641 + Follow Print Create Service Report

Owner: **Meehan's Dispatch Services** Status: **Assigned** Subject: **Assure - CT4010-HD-GW - Head Replacement (Ver 08) - 20090641** Case: **16580815**

Details Related RMA / PSO Related Collaborate **WO Assignment**

Advanced Search Search

Email Address Postal Code City

My Organization Yes No

Certification Name Available Selected

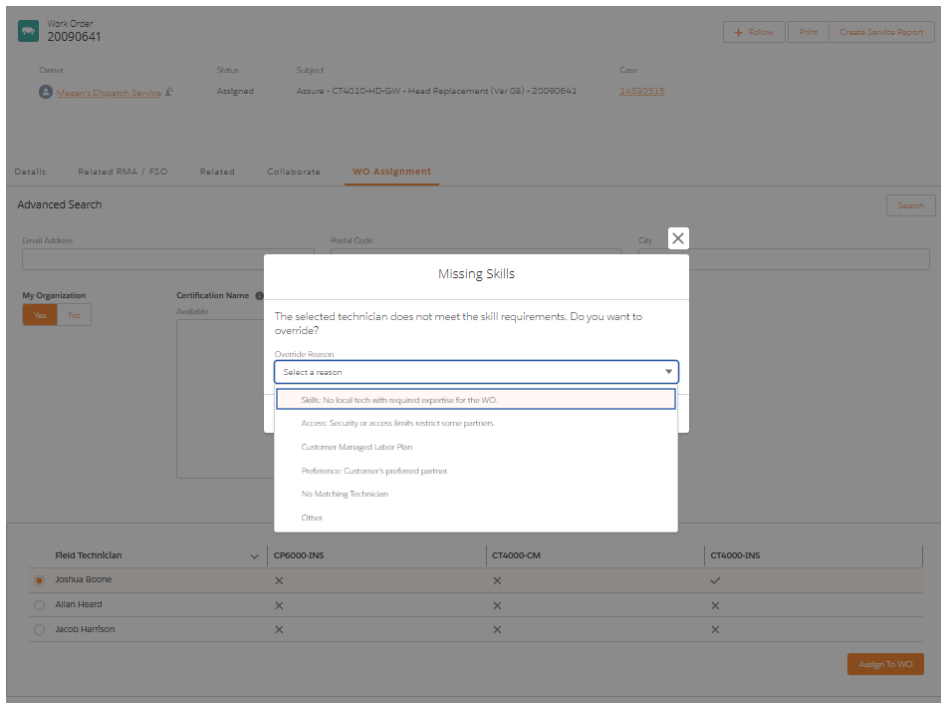
	CP6000-INS	CT4000-CM	CT4000-INS
Available			
Selected	CP6000-INS	CT4000-CM	CT4000-INS

Field Technician	CP6000-INS	CT4000-CM	CT4000-INS
<input checked="" type="radio"/> Joshua Boone	X	X	✓
<input type="radio"/> Allan Heard	X	X	X
<input type="radio"/> Jacob Harrison	X	X	X

Assign To WO

- Click **Assign To WO** to associate the technician with the work order. The **Missing Skills** window is displayed.

You need to provide an override reason for selecting a technician without the required skill set.



- Select the required option and click **Confirm Override** to assign the technician.
- Return to the **Details** tab to update the critical information for scheduling.

Assign a Freelancer

To assign a freelancer to a work order, perform the following steps:

- Navigate to the **Work Order Assignment** to assign a technician.
- In **My Organization**, select **No**.

3. Enter the technician's **Email Address** and click **Search** to find a matching personnel.

Work Order
20090641

Follow Print Create Service Report

Owner: Meagan's Dispatch Service Status: Assigned Subject: Assure - CT4010-HD-GW - Head Replacement (Ver 08) - 20090641 Case: 14530515

Details Related RMA / FSO Related Collaborate **WO Assignment**

Advanced Search Search

Email Address: nboyle7300@example.net.invalid Postal Code: City:

My Organization: Yes No

Certification Name

Available: CP6000-INS, CT4000-CM, CT4000-INS

Selected:

Field Technician Address

Joshua Boone 110 Church St., Broadway North Carolina, 27505, United States

Assign To WO

4. From the search results, select the technician for assignment.
5. Click **Assign To WO** to associate this technician with the work order. The **Missing Skills** window is displayed.
6. Select the reason for choosing a freelancer and click **Confirm Override** to assign the technician.
7. Return to the **Details** tab to update the critical information for scheduling

Manage a Shipped Work Order 8

Managing a shipped work order in the Partner Portal application involves reviewing task details, verifying shipping information, and scheduling service dates based on delivery timelines.

To manage a shipped work order, perform the following steps:

- 1. Access the **Work Order** page, review the task details (for example, replacing a charging cable), and record any specific requirements such as uploading images or returning old parts.
- 2. Verify the shipping information in the **Related RMA / FSO** tab, to monitor the shipment and confirm the expected delivery date.

The screenshot displays a 'Work Order' page with the following details:


- Work Order ID:** 20090627
- Owner:** Megan's Dispatch Service
- Status:** In Progress
- Subject:** Assure - CT+G20+HD+GW - Head Swap (Ver 25) - WO#20090627
- Case ID:** 14533626

Buttons for '+ Follow', 'Print', and 'Create Service Report' are visible.

Navigation tabs include 'Details', 'Related RMA / FSO' (selected), 'Related', 'Collaborate', and 'WO Assignment'.

Order Number	Order Class (NS)	Created Date
00287387	Assure Fulfillment Sales Order	6/4/2025 12:30 PM

A 'View All' link is located at the bottom right of the table.

 **NOTE:** Depending on the delivery date, schedule a service date to the customer.

3. Navigate to the **Details** tab and access the **Customer Information** section.
 - a. Enter the **Appointment Date**, **Technician Name**, and **Contact Details** into the work order.

Customer Information

Account Kohls	Contact James Wallace
Number of Total Stations	Case Contact Email greerbrent8860@example.com.invalid
Number of Site Validations	Case Contact Phone (321) 952-8480
Appointment date	Address 205 Palm Bay Rd NE Melbourne, Florida 32904 United States
Technician Name Joe Bradley	Scheduling Completed 2/7/2026
Technician Name	
Phone Number 407-276-8085	



NOTE: Once the partner accepts the work order and provides shipping details, the parts are ordered. The carrier then picks up the order on the scheduled date, and the estimated delivery date is determined from the shipping information. Based on the work order entitlement and service level attributes, the Target SLA is set. For example, if the estimated delivery date is March 1st, the SLA is calculated as one business day after delivery, making the Target SLA as March 2nd.

-
4. If the appointment date provided exceeds the Target SLA, you will be prompted to decide if you want to continue with the missed SLA appointment date.

Selected Appointment Date is not within SLA Completed Date

*** Do you want to continue?**

Yes

No

*** Delay Reason**

Select an Option

- Delay due to Unresponsive POC
- Delay due to POC Schedule Preference
- O&M Partner Work Order Management Performance
- Delay due to weather
- Technician Availability
- Delay due to Special On-Site Requirement
- Delay due to local Regulatory/Compliance
- Part delivery is later than expected delivery date
- Parts arrived damaged or are missing

Selected Appointment Date is not within SLA Completed Date

*** Do you want to continue?**

Yes

No

*** Delay Reason**

Technician Availability

OK

- a. If you select **Yes**, provide a reason for delay as to why you are unable to meet the Target SLA Date and then click **Ok**. The **Appointment Date** field is updated with the date you submitted and the missed SLA reason is shared with ChargePoint.

The following tables lists the detailed descriptions for the reason for delay.

Reason for Delay	Description
Delay due to Unresponsive POC	If you are unable to connect with the POC to schedule and meet the SLA, do not wait until after the SLA date to inform ChargePoint that the POC is unresponsive. We will assist in identifying an alternate POC.
Delay due to POC Schedule Preference	If the POC proposes a date that falls beyond the SLA deadline.
O&M Partner Work Order Management Performance	If ChargePoint has not provided the necessary information in the WO to enable completion of the repair by the SLA date (see examples below), such as: <ul style="list-style-type: none"> • O&M being asked to delay scheduling, • Clarification needed on WO details (For example: POC providing a different station address than the one listed), then the issue should be flagged promptly.
Delay due to weather	If the forecast indicates that the repair cannot be completed by the Target SLA date, report the issue using this option.
Technician Availability	If O&M does not have technicians available to perform the service work by the Target SLA date.
Delay due to Special On-Site Requirement	If there are special site-access requirements that have delayed the appointment such as: <ul style="list-style-type: none"> • Safety glasses required • Paperwork O&M must complete and provide (for example, COI, JHA Form, and so on.)
Delay due to local Regulatory/Compliance	If the work requires permits or paperwork to comply with local or state codes (for example, prevailing wage requirements)
Part delivery is later than expected delivery date	If the part does not arrive on its scheduled delivery date.
Parts arrived damaged or are missing	If the part arrives damaged during shipping, or if not all parts are received.

- b. If you select **NO**, you return to the main page of the WO and the **Appointment Date** field is enabled to make the necessary changes.

Place Work Order On Hold 9

Placing a work order on hold in the Partner Portal application requires submitting a request through the Collaborate tab rather than doing it directly. Users must share an update with the dispatcher to inform them of the delay, and once confirmed, the work order is placed on hold until the scheduled repair date. It is important to ensure that all relevant guides and documents are attached in the Notes and Attachments section, and to verify customer information, scheduled dates, and service details in the Details tab so the work order can be resumed smoothly when repairs are ready to proceed.

To place a work order on hold, perform the following steps:



IMPORTANT: You do not have direct access to place a work order on hold. Submit a request using the **Collaborate** tab.

1. On the **Work Order** page, click **Collaborate** tab.
2. Click **Share an update**, and inform the dispatcher of the delay and wait for the communication.

All times displayed in this partner portal page are in (GMT-06:00) Central Standard Time (America/Chicago)

Work Order
20090641

+ Follow Print Create Service Report

Owner	Status	Subject	Case
Megan's Dispatch Service	In Progress	Assure - CT4010-HD-GW - Head Replacement (Ver 08) - 20090641	14530515

Details Related RMA / FSO Related **Collaborate** WO Assignment

Post

Share an update... Share

Sort by: Most Recent Activity

Search this feed...

[Megan's Dispatch Service \(Partner\)](#)
February 2, 2026 at 10:19 AM

Work Order: 20090641
Assigned To: AllanHeard
Assignment Method: Manual Override
Override Reason: Other
Assigned On: 2/2/2026 10:19 AM

Like Comment 1 view

Write a comment...

3. Once the dispatcher confirms, place the work order on hold until the scheduled repair date.



NOTE: Ensure that all necessary guides or documents are attached and accessible in the **Notes and Attachments** section.

- Navigate to the **Details** tab and access the **Customer Information** section. Verify the scheduled date and service information for resuming the work order or performing the repair.

Work Order
20090641

+ Follow Print Create Service Report

Owner: Megan's Dispatch Service Status: In Progress Subject: Assure - CT401D-HD-GW - Head Replacement (Ver 08) - 20090641 Case: 14530515

Details Related RMA / FSO Related Collaborate WO Assignment * Required Information

> Description

Customer information

Account: Kohl's
Number of Total Stations
Number of Site Validations

Contact: James Wallace
Case Contact Email: greerbrnt5860@example.com.Invalid
This field is calculated upon save
Case Contact Phone: (321) 952-8480
This field is calculated upon save

Address: 205 Palm Bay Rd NE
Melbourne, Florida 32904
United States

Appointment date
Date: 2/3/2025 Time: 12:00 PM

Map: LUND GARDENS, JASMINE ESTATES

Technician Name / Email: Joe Bradley

Technician Name: Allan Heard

Scheduling Completed: 2/7/2025

Cancel Save

Complete a Work Order 10

Completing a work order in the Partner Portal application requires updating all deliverables and mandatory details before marking it as complete.



NOTE: After completing the WOLIs on-site, update the portal to mark the work order as complete.

To complete work order, perform the following steps:

1. Confirm that all required deliverables including images and supporting documents are uploaded to the work order. These can be added in the **Notes and Attachments** section or through the **Collaborate** tab.
2. In the **Collaborate** tab, provide any additional notes or feedback to the ChargePoint dispatcher.
3. Prior to closing the work order, confirm that all mandatory fields such as **Scheduling Completed Date**, **Appointment Date**, **Technician Name**, and **Technician Phone Number** are filled in.
4. Enter the **Actual Site Arrive Time (Date/Time)** and **Actual Site Departure Time (Date/Time)** of the technician prior to moving the WO to complete.

The screenshot shows the 'Details' tab of a work order. The 'Actual Site Arrive Time (Date/Time)' field is set to 3/10/2026 9:00 AM and the 'Actual Site Departure Time (Date/Time)' field is set to 3/10/2026 10:00 AM. Both fields have edit icons to their right.



NOTE: Ensure that all required fields are completed before closing the work order. If any are left incomplete, an error message appears that the work order cannot be closed.

5. Ensure that all required information and deliverables are finalized and then click **Completed** to move the work order into the completed queue.

CHARGEPOINT PARTNER

Home Work Orders Field Technician Management Dashboard Library Chargepoint University

Accept **Completed** Could Not Complete Request For Assistance More Actions

All times displayed in this partner portal page are in (GMT-06:00) Central Standard Time (America/Chicago)

Work Order 20090641 [+ Follow](#) [Print](#) [Create Service Report](#)

Owner	Status	Subject	Case
Mesan's Dispatch Service	In Progress	Assure - CT4010-HD-GW - Head Replacement (Ver 08) - 20090641	14592515

Details Related RMA / FSD Related Collaborate W/O Assignment

Required Information

Description

Work Order Number 20090641	Target SLA Date 6/13/2025 2:00 AM
Entitlement	Customer Service Executive Jonathan David Rejan
Repair SLA NonAssure	Description
Subject	Station-1: Name: AMPCAP / 1327 PALM BAY Serial Number: 183741020161 MAC Address: 002481000003-008D Station Model: CT4010-HD-GW Station Physical Address: 205 Palm Bay Rd NE, Melbourne, Florida, United States - 32904
Assure - CT4010-HD-GW - Head Replacement (Ver 08) - 20090641	

6. After completing the work order and submitting proof of return (when required), an additional window appears. Enter the following details:

- a. **Rental Equipment Details:** Provide a clear explanation of why rental equipment was necessary. If approved by ChargePoint, this may also include costs incurred for purchasing equipment during the dispatch (for example, screws, lugs, tarp, rope).
- b. **Rental Equipment Cost:** Provide rental equipment cost details. For example, forklift and EV vehicles.
- c. **Permit Details:** Provide an explanation detailing the reason the permit was required.
- d. **Permit Cost:** Provide the additional permits required on site.



IMPORTANT: Ensure that if no additional costs were incurred, the fields are submitted blank.

7. Click **Submit**. The work order is marked as **Completed**.

Once the work order is marked as completed, ChargePoint will conduct a review. After confirming that all work and deliverables meet the required standards, the work order will be transitioned to a closed status.

8. You can review the completed queue to verify the work order has been successfully transitioned to completed status and subsequently closed by ChargePoint.

Other Work Order Status Scenarios 11

Other work order status scenarios in the Partner Connect application include canceling, marking as “Could Not Complete,” rejecting, or handling unfinished work. The other work order status scenarios are as follows:

Cancel a Work Order

The following are few example scenarios:

- **Self-Resolved Issue:** If a station problem (for example, network connectivity) resolves itself and remains stable for a set period (such as 48 hours), the work order may be canceled since no repair is required.
- **Customer Upgrades:** If a customer chooses to upgrade their equipment (for example, from a CT4000 to a CP6000) instead of repairing it, the work order may be canceled as the upgrade will replace the repair.



NOTE: Please include a comment in the **Collaborate** tab detailing the reason for cancelling the Work Order.

Mark a Work Order as Could Not Complete

The following are few example scenarios:

- **Wrong Equipment Shipped:** If incorrect equipment is delivered for example, a single-port station instead of a dual-port, the work order cannot be completed and should be marked as Could Not Complete.
- **Physical Obstructions:** If physical issues (such as a stripped screw) prevent the technician from completing the task, the work order must be marked as Could Not Complete.
- **Incorrect Diagnosis:** If the original diagnosis was inaccurate and the actual issue does not match the work order (for example, a cosmetic defect instead of an electrical fault), the work order should be marked as Could Not Complete.

Reject a Work Order

The following is an example scenario:

- **Mismatched Work Requirements:** If the work order cannot be fulfilled due to a mismatch between the assigned task and the equipment or site conditions, it may be rejected. These cases are uncommon.

Handle Unfinished Work

When a work order is marked as Could Not Complete, ChargePoint may issue a new work order once the correct issue or equipment has been identified, ensuring the task can be completed at a later stage.

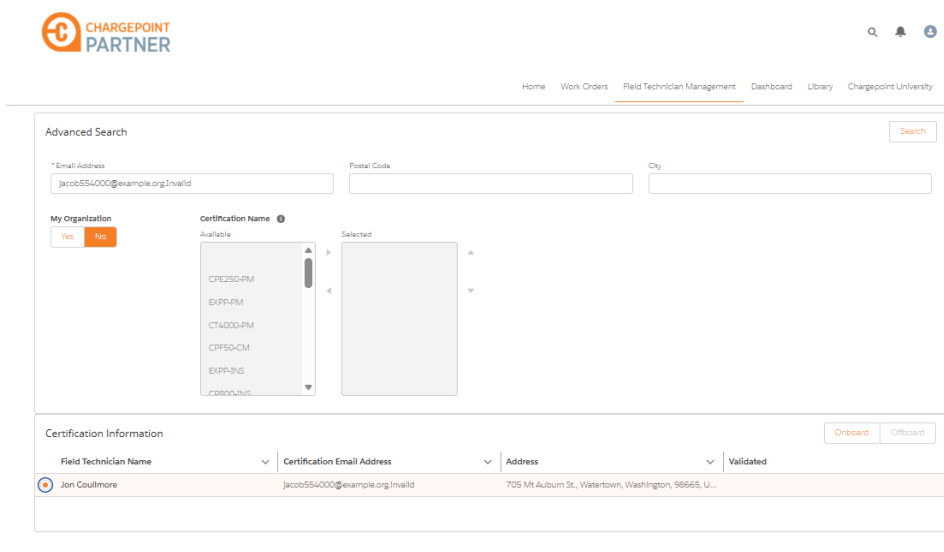
Onboard and Offboard a 12 Technician

Onboarding and offboarding technicians in the Partner Portal application ensures technicians are properly added or removed while maintaining accurate certification and organizational records.

Onboard a Technician

To onboard a technician to the organization, perform the following steps:

1. On the ChargePoint Partner Portal **Home** page, click **Field Technician Management** tab.



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2. In **My Organization**, select **No**.
3. Enter the technician's **Email Address** and click **Search** to find a matching personnel.
4. In **Certification Information**, select the technician for on-boarding and click **Onboard**.
5. Enter the technician's **Corporate Email Address**. Ensure to provide the same email address as the organization's domain.
6. Click **Onboard** to add this technician to the organization.
7. In **My Organization**, select **Yes**.
8. Click **Search** to verify the technician's certification records and confirm successful onboarding.

Offboard a Technician

To offboard a technician from the organization, perform the following steps:

1. On the ChargePoint Partner Portal **Home** page, click **Field Technician Management** tab.
2. Select the technician from the **Certification Information** list.
3. Enter the technician's **Email Address** to isolate the technicians available in the technician list.
4. Click **Search** to isolate the technician and proceed with off boarding.
5. In **Certification Information**, select the technician you wish to off board and click **Offboard** to begin the removal process.

A success message is displayed confirming that the you have successfully off boarded the technician.



NOTE: Here is a short video, demonstrating how to [Onboard and Offboard a Technician](#).

Limited Warranty Information and Disclaimer

The Limited Warranty you received with your charging station is subject to certain exceptions and exclusions. For example, your use of, installation of, or modification to, the ChargePoint® charging station in a manner in which the ChargePoint® charging station is not intended to be used or modified will void the limited warranty. You should review your limited warranty and become familiar with the terms thereof. Other than any such limited warranty, the ChargePoint products are provided "AS IS," and ChargePoint, Inc. and its distributors expressly disclaim all implied warranties, including any warranty of design, merchantability, fitness for a particular purposes and non-infringement, to the maximum extent permitted by law.

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