

# Asset portfolio management in the Reduxi Portal

A step-by-step guide for aggregator accounts: create location groups, link controllers and set up user access through Global Settings in the Reduxi Portal.

🕒 approx. 8 minutes   🔑 Aggregator account required

📄 Reduxi Portal



Aggregator account main view: location navigation with **Global Settings**, flexibility chart and device overview

## Text description of this image

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## 1 Before you start

The **Global Settings** menu lets an aggregator manage their own installation structure: create location groups and individual locations, link controllers to a location, and control which users have access to which installation.

This article covers these three areas step by step. It applies regardless of which OEM devices (for example inverter or battery brands) are connected on your side.



### Visibility

The **Global Settings** menu item is only visible for aggregator accounts. With any other role, this area does not appear. You can request an aggregator role from the relevant manager.



### Recommended: use the web portal, not the app

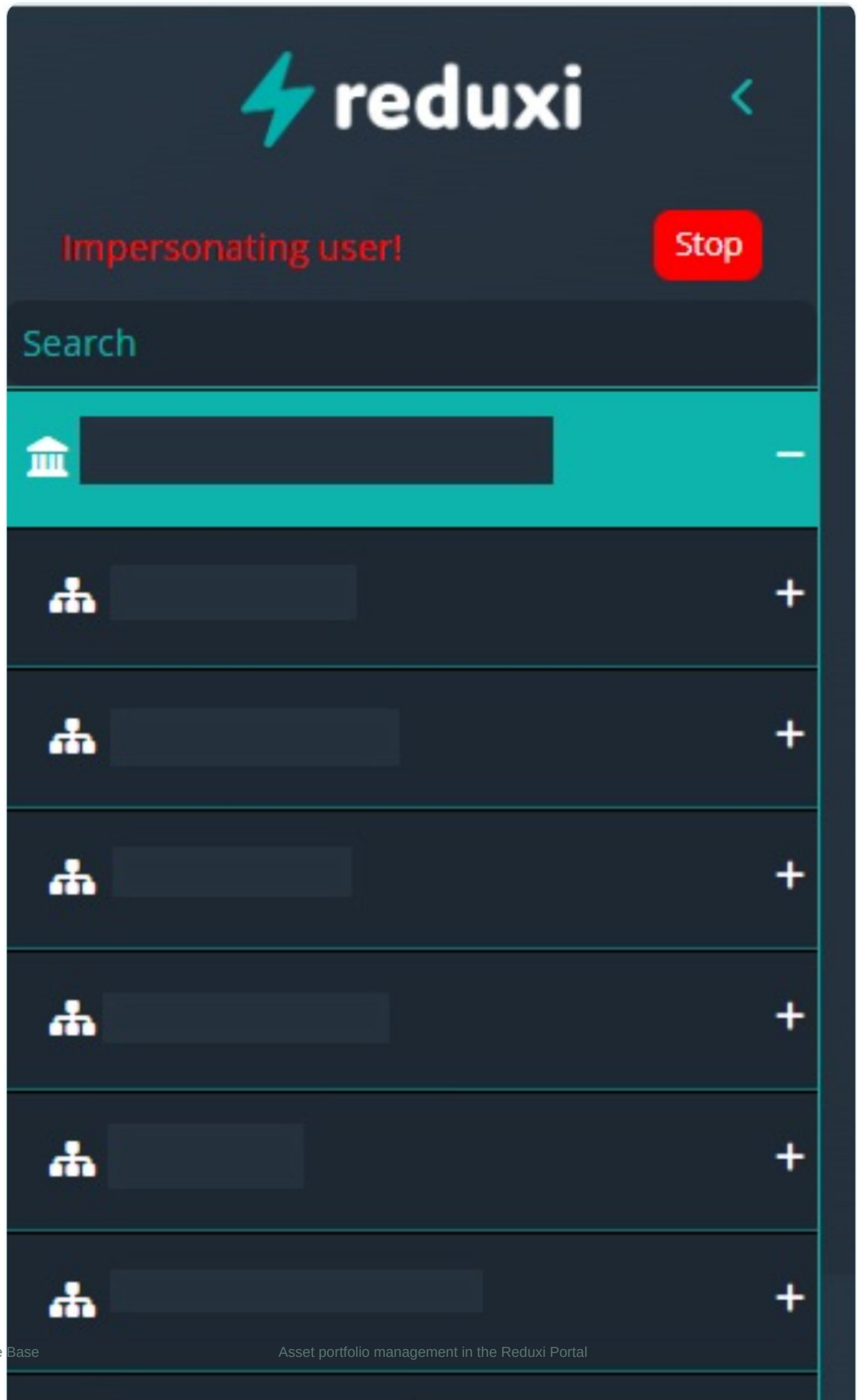
This kind of management works best in the web portal [reduxi.app](https://reduxi.app). Managing locations, controllers and users in the mobile app quickly becomes hard to follow.

## 2 Open Global Settings

1

Select "Global Settings" in the left navigation

This opens the management menu with the areas **Locations & Groups**, **OEM Devices** and **Users**.



## 2

### Review the basic account information

An overview with basic account information appears first, such as company name, URL and address. From here you can switch to the three areas **Locations & Groups**, **OEM Devices** and **Users**.

Basic account information: company name, URL and address

#### 1. Text description of this image

Screenshot of the Reduxi Portal (dark theme), page Global Settings, with a blacked-out account name in the breadcrumb and in the sidebar. Sidebar: Reduxi logo with collapse arrow label

## 3 Manage Locations & Groups

The **Locations & Groups** area lets you organize your installation structure freely:

- create, rename, move or delete location groups
- create, rename, move or delete individual locations
- create a location with a linked controller
- create a location with a P1 meter

Three buttons are available at the top of the header: **Location Group**, **Location with Controller** and **Location with P1 Wifi**.

| ID   | Name | Entries | Options |
|------|------|---------|---------|
| 4672 |      | 0       | 2       |
| 5641 |      | 0       | 2       |
| 4617 |      | 0       | 2       |
| 5307 |      | 0       | 2       |
| 3846 |      | 0       | 2       |
| 4112 |      | 0       | 1       |
| 5714 |      | 0       | 1       |
| 6319 |      | 0       | 0       |

Locations & Groups: table of all locations in the group, with the buttons at the top left

## Text description of this image

### 3.1 Create a location group

The **Location Group** button creates a new group to bundle several locations, for example by customer, region or installation type. After you name and confirm the group, it appears in the location navigation on the left.

### 3.2 Link a controller to a location

#### 1 Check the controller status

|         |     |
|---------|-----|
| Devices | OEM |
|---------|-----|

#### 2 Select "Location with Controller"

The **Location with Controller** button in **Locations & Groups** starts the wizard with the remaining steps. See [Point 4](#) (View location) for a detailed walkthrough of the same wizard.

#### 3 Assign a location name

The unit ID of the controller works well as a name, for example. You can change the name later.



#### Tip

Descriptive location names (for example customer name or address) make larger installation portfolios much easier to navigate later.

### 3.3 Create a location with a P1 meter

The **Location with P1 Wifi** button creates a location that is connected through a P1 metering device instead of a full controller. The process is essentially the same as for a controller:

- P1 Wifi
- click **Location with P1 Wifi** to start the wizard with the remaining steps
- assign a location name



#### Note

P1 meters only capture metering data and do not replace a full controller. In the **OEM Devices** overview, they are recognized by the type **P1 Wifi**.

## 4 OEM Devices: overview of all controllers

The **OEM Devices** menu item shows every controller that has been added, at a glance, including:

- the assigned owner
- the current connection status

| Type                                        | Device ID           | ID   | Owner | Location | Software Version  | Is connected? |
|---------------------------------------------|---------------------|------|-------|----------|-------------------|---------------|
| P1 Wifi                                     | P100-001K-SL4V-N3T4 | 4285 |       |          | 20260114114843000 | ●             |
| P1 Wifi                                     | P100-001K-SL4V-RGF0 | 4590 |       |          | 20260513000000000 | ●             |
| P1 Wifi                                     | P100-001K-SL4V-RGSW | 4792 |       |          | 20260114114843000 | ●             |
| <input checked="" type="checkbox"/> P1 Wifi | P100-001K-SL4V-RJK0 | 4794 |       |          | 20260513000000000 | ●             |
| Controller                                  | V7EJ-JYAO-2QRA-RPF1 | 4843 |       |          | 20260422133553000 | ●             |
| Controller                                  | L0BV-9E0F-5OD4-8Y15 | 5190 |       |          | 20260224125936000 | ●             |
| Controller                                  | 3WDT-KCKO-20QD-S1E6 | 5829 |       |          | 20260707085758000 | ●             |
| Controller                                  | IDLR-F4VE-FYYX-CI88 | 5945 |       |          | 20260721131442000 | ●             |
| Controller                                  | CF73-WGA3-DC43-GX44 | 6588 |       |          | 20260703160651000 | ●             |
| P1 Wifi                                     | P100-001K-SL4V-RJM4 | 6907 |       |          | 20260513000000000 | ●             |
| Controller                                  | 06SP-F5U-GJ43-GQB9  | 6929 |       |          | 20260603101244000 | ●             |
| Controller                                  | W2AA-YTLM-VWVQ-9F23 | 6969 |       |          | 20260603101244000 | ●             |

OEM Devices: all controllers with type, device ID and connection status

#### Text description of this image

### 4.1 Assign an owner

To assign or change the owner of a controller, select its row with the checkbox on the left of the table. The **Assign Owner** button then becomes available at the top right:

Showing 12 controllers ✕ 1 Selected ↑ Set owner 🏠 View location

Search filters

| Type    | Device ID           | ID   | Owner | Location | Software Version  | Is connected   |
|---------|---------------------|------|-------|----------|-------------------|----------------|
| P1 Wifi | P100-001K-5L4V-N3T4 | 4285 |       |          | 20260114114843000 | <span>●</span> |

Toolbar after selecting a row: **Assign Owner** and **View Location**

### Text description of this image

In the **Set owner** dialog, select the new owner from the dropdown:

Set owner

✕

Cancel

Set

*Set owner dialog: dropdown to assign an owner, red X to remove the current one*

### Text description of this image



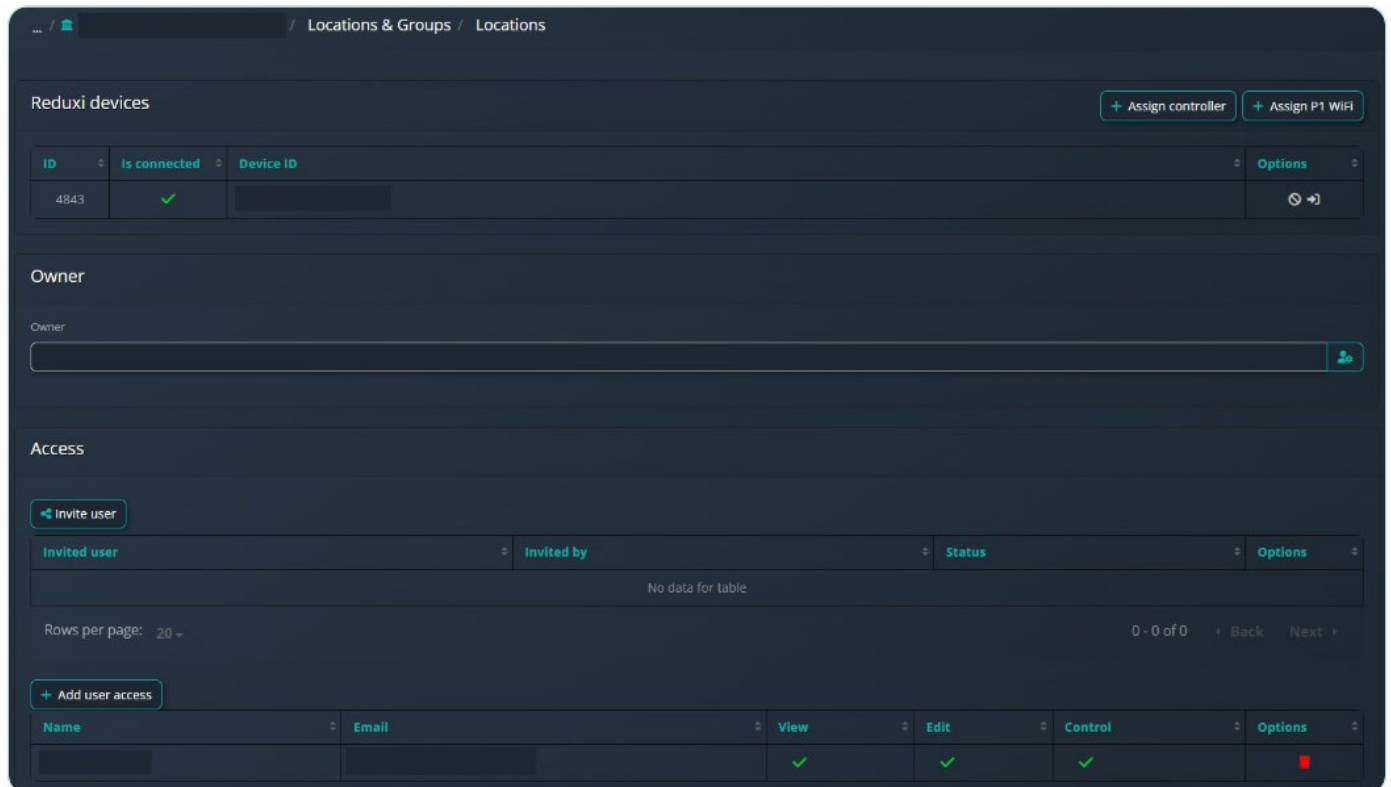
#### Red X

The red X in the dropdown removes the currently assigned owner. The controller then becomes partially "free": the owner assignment is cleared, even though the controller may still be linked to a location. You need this, for example, to assign the controller to a different location later (see [Point 3](#), Link a controller to a location).

## 4.2 View location

The **View Location** button opens the detail view of the selected controller. It has three areas:

- **OEM Devices:** device information such as connection status and device ID, plus options to disconnect or open the device
- **Owner:** the same owner dialog as under Assign an owner
- **Access:** a separate overview of the users with access to this specific location or controller, including the **View**, **Edit** and **Control** permissions



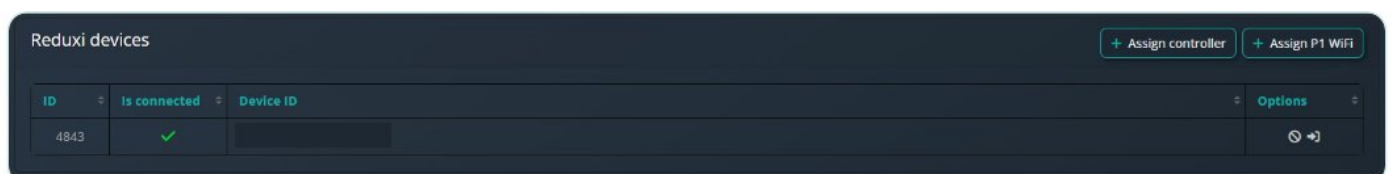
Location detail view: device data, owner and access overview

### Text description of this image

In the device list under **OEM Devices**, two icons are available in the **Options** column:

-  disconnects the controller from the location. It becomes unowned again and can then be assigned to a different location.
-  opens the associated location directly (a link to the location itself).

The **Add Controller** and **Add P1 Wifi** buttons at the top right link a further controller or a P1 meter to this location:



OEM Devices in the location view: **Add Controller** and **Add P1 Wifi**

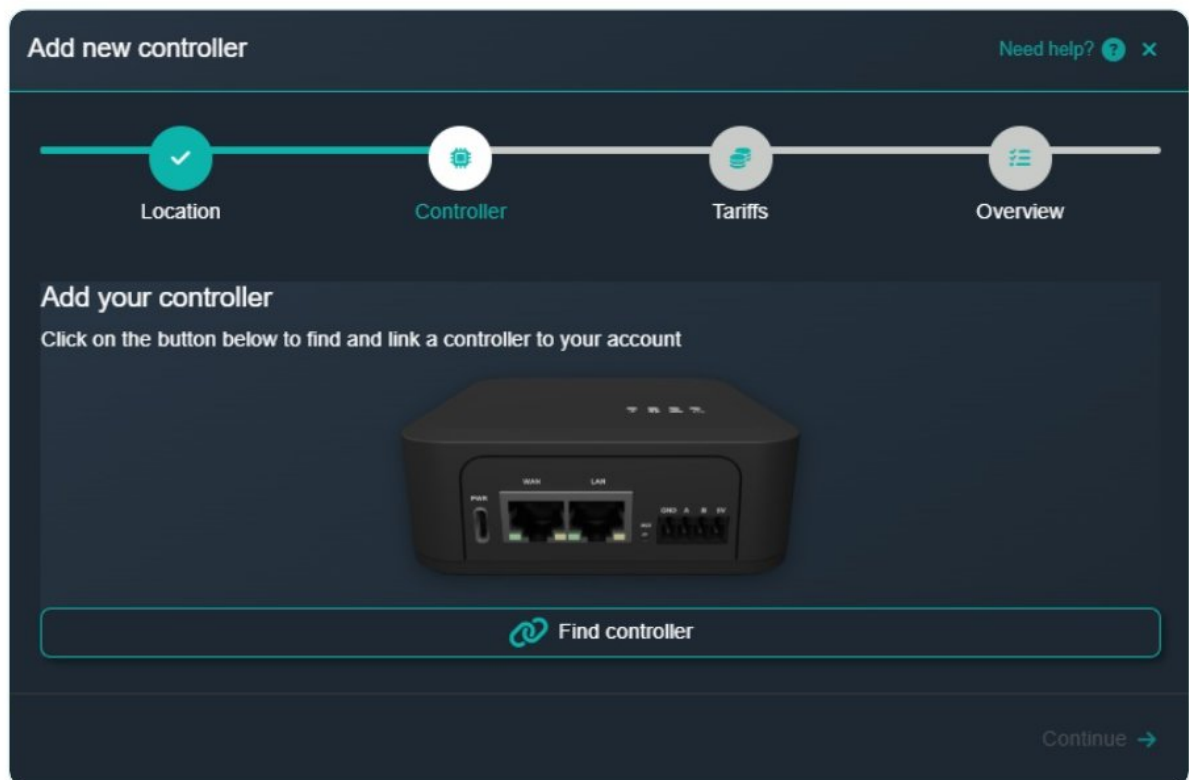
### Text description of this image

The wizard has the following steps. They are shown for **Add Controller**. The flow for **Add P1 Wifi** only differs visually.

# 1

## Find the controller

In the **Controller** step, the **Find Controller** button opens the search for a controller that is not yet linked.



Step **Controller**: find controller

### 1. Text description of this image

Screenshot of the dialog "Add new controller" in the Reduxi Portal (dark theme), with "Need help?" link and close X. Progress bar: Location (done, check mark), Controller (current, highlighted), Tariffs

## 2

## Enter the serial number or scan the QR code

In the **Link Controller** dialog, enter the serial number in the format **XXXX-XXXX-XXXX-XXXX** or capture it via QR code. You find it on the back of the controller (a "SERIAL" sticker or QR code), in the local web interface at the bottom right, or under **Settings > System > Identifier** ("Device ID").

**Link a controller**

To link an existing controller to your profile, please enter the serial number of that controller. It is in the following format: "XXXX-XXXX-XXXX-XXXX"

Serial number of a controller can be found here:

- Look at the back of your controller. There will be a sticker with provided "SERIAL" or a QR Code
- On controller's local web interface, look into the lower right corner.
- Controller's web interface inside settings: Settings > System > Identifier. Look for "Unit ID" field.

**Scan QR Code**

**Serial number**

XXXX-XXXX-XXXX-XXXX

Cancel **Confirm**

*Enter the serial number or scan the QR code*

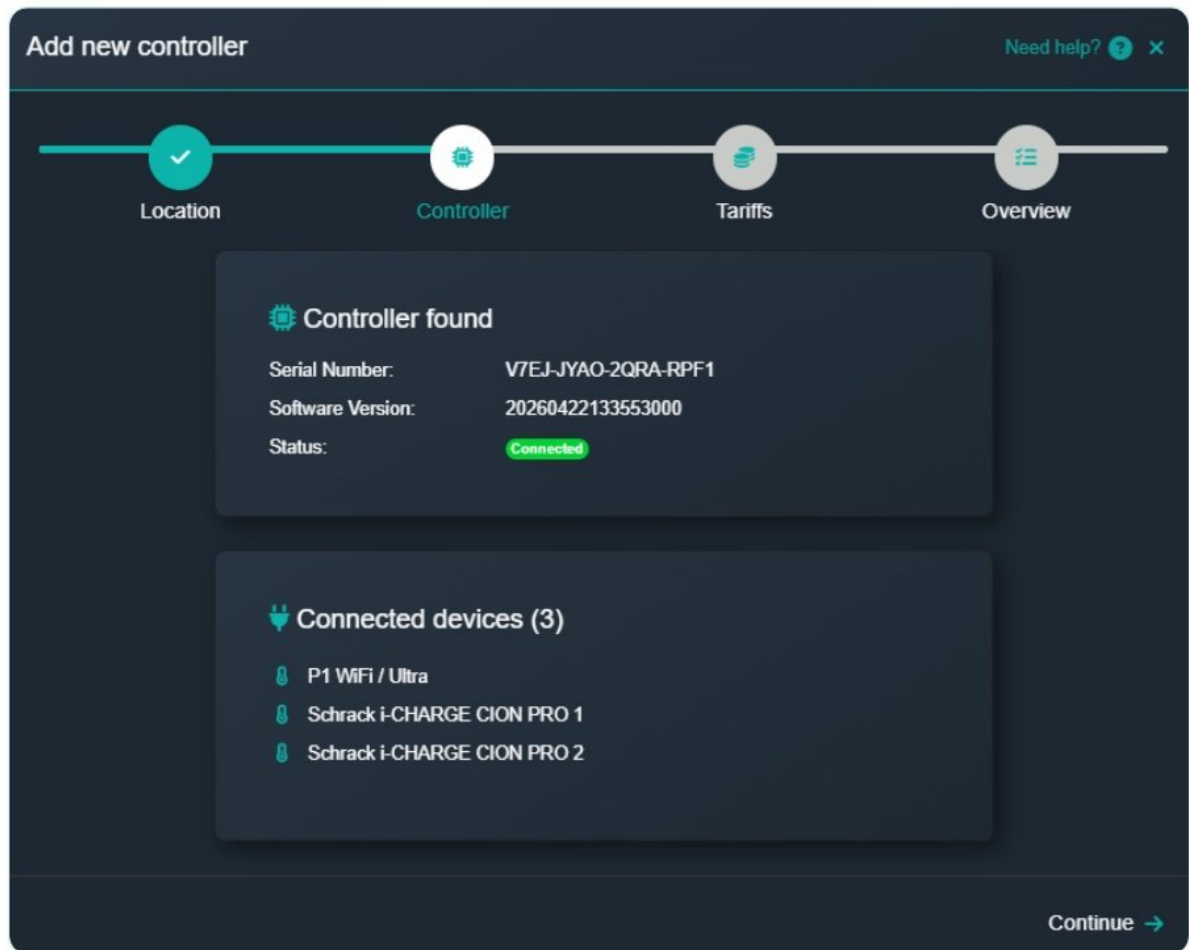
### 1. Text description of this image

Screenshot of the dialog "Link a controller" in the Reduxi Portal (dark theme), teal close X at the top right. Text: "To link an existing controller to your profile, please enter the serial number of that

## 3

## Confirm the controller

Once linked successfully, the serial number, firmware version and status are shown, along with any devices already connected (for example inverter, battery storage).



Controller found, including connected devices

### 1. Text description of this image

Screenshot of the dialog "Add new controller" in the Reduxi Portal (dark theme), with "Need help?" link and close X. Progress bar: Location (done, check mark), Controller (current, highlighted), Tariffs

## 4

## Tariffs (optional)

Select or create a tariff plan for purchase/sale price and grid fees. You can skip this step and complete it later.

**Add new controller** Need help? ? x

Location ✓ Controller ✓ **Tariffs** Overview

Please select or create a pricing plan after you complete the setup.

[Skip this step. I will define tariffs later →](#)

**Supplier energy buy price (per kWh)**  
Select price list

**Supplier energy sell price (per kWh)**  
Select price list

**Grid energy fee price (per kWh)**  
Select price list

**Grid power fee price (per kW)**  
Select price list

[← Back](#) [Continue →](#)

*Tariffs step (optional, can be skipped)*

### 1. Text description of this image

Screenshot of the dialog "Add new controller" in the Reduxi Portal (dark theme), with "Need help?" link and close X at the top right. Progress bar with four steps: Location (done, check mark), Controller

The final step summarizes the entries and completes the assignment.

**Add new controller** Need help? ? x

Progress bar: Location ✓ Controller ✓ Tariffs ✓ Overview (active)

**Location**

Name  
Country  
Region  
Timezone

**Controller**

Serial: V7EJ-JYAO-2QRA-RPF1  
Software version: 20260422133553000  
Is connected: Yes  
Devices:  
 P1 WiFi / Ultra  
 Schrack I-CHARGE CION PRO 1  
 Schrack I-CHARGE CION PRO 2

**Tariffs**

Supplier energy buy price (per kWh): /  
 Supplier energy sell price (per kWh): /  
 Grid energy fee price (per kWh): /  
 Grid power fee price (per kW): /

← Back **Confirm** ✓

*Overview step: summary after completing the wizard*

### 1. Text description of this image

Screenshot of the dialog "Add new controller" in the Reduxi Portal (dark theme), step Overview, with "Need help?" link and close X. Progress bar: Location, Controller, Tariffs (all done, check marks)

In the **Access** area, you can grant additional users access to this one location, alongside the owner:

- **Invite User** invites a user who is not yet registered by email
- **Add User Access** grants an existing user access to this location
- for each user, set access to just **View**, or also **Edit** or **Control**
- the trash icon in the **Options** column revokes the access of a user



### Difference from "Users"

This access overview only shows the permissions for the one selected location. General user management (creating, deleting, assigning roles for the whole account) is available under [Point 5](#).

## 5 Manage users

The **Users** area controls who has access to your installations, for example colleagues or end customers who should see the installation in the app.



### Created automatically during installation

A user for the end customer is typically created automatically when an installation is set up. You can also create additional users manually through Global Settings, for example for colleagues or additional points of contact.

- all registered users are visible, including email, role and verification status
- the **New User** button creates additional users manually
- existing users can be deleted
- roles can be assigned, for example **Basic User** (restricted access) or **Aggregator** (full management access)

| Name | Email | Role       | Is verified |
|------|-------|------------|-------------|
|      |       | Basic User | ✓           |
|      |       | Basic User | ✓           |
|      |       | Basic User | ✓           |
|      |       | Basic User | ✓           |
|      |       | Basic User | ✓           |
|      |       | Basic User | ✓           |
|      |       | Basic User | ✓           |
|      |       | Aggregator | ✓           |

Users overview: all registered users with role and verification status

### Text description of this image



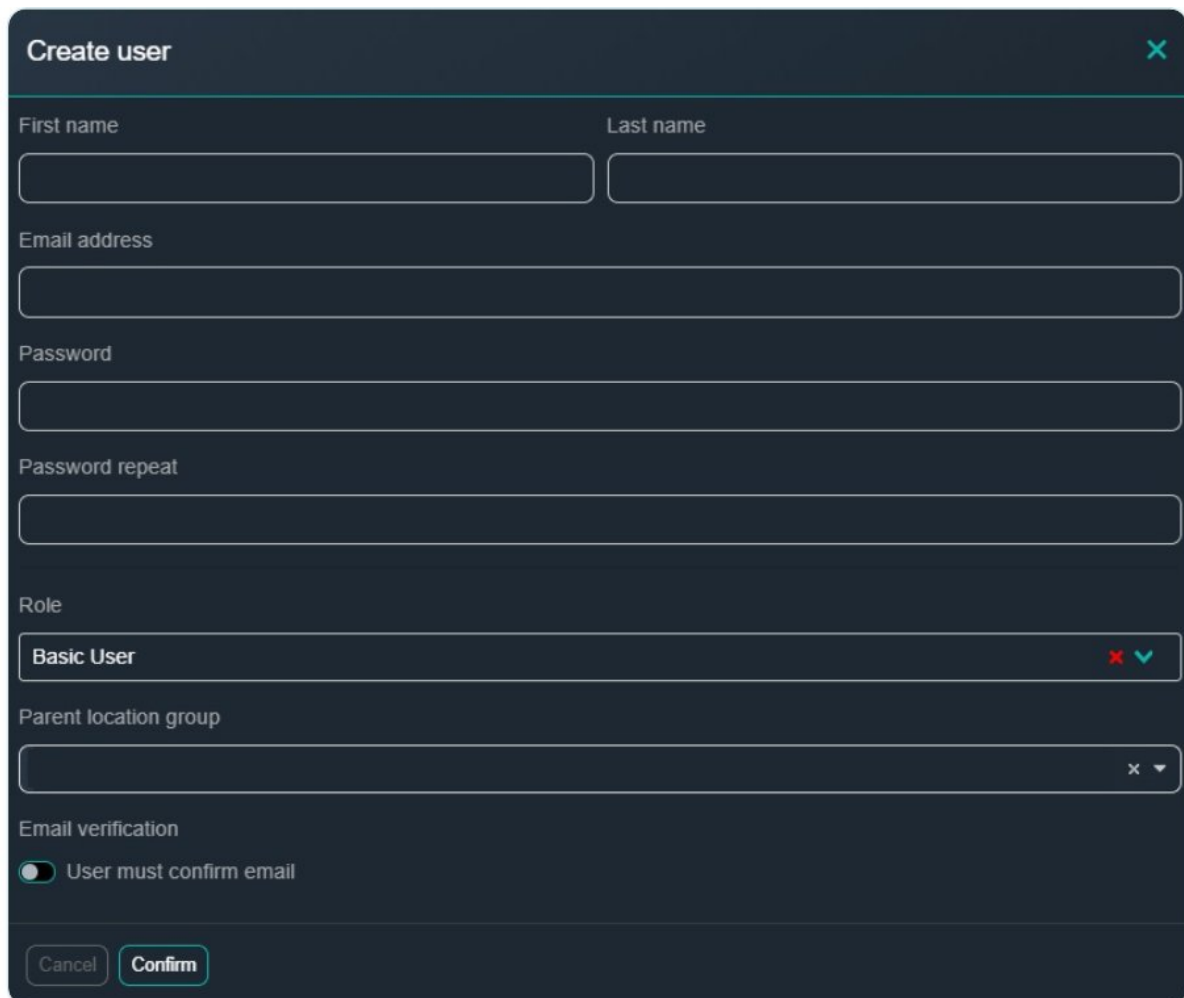
### Important

Without the right user access, an installation can neither be viewed nor shown in the app. Every person who needs access requires a dedicated user.

### 5.1 Create a new user

The **New User** button opens the **Create user** dialog:

- 1 Enter basic details**  
Enter the **first name**, **last name** and **email address** of the new user.
- 2 Set a password**  
Set a password and confirm it under **Repeat password**.
- 3 Select a role**  
For example **Basic User** for restricted access, or **Aggregator** for full management access.
- 4 Assign a parent location group**  
This determines which location group, and therefore which installations, the user gets access to.
- 5 Set email verification**  
The **User must confirm email** toggle determines whether the user must confirm the email address before the first login.
- 6 Finish with "Confirm"**  
The new user then appears in the users overview.

A dark-themed dialog box titled "Create user" with a close button (X) in the top right corner. The form contains several input fields: "First name" and "Last name" (two separate boxes), "Email address" (one box), "Password" (one box), "Password repeat" (one box), "Role" (a dropdown menu showing "Basic User" with a red X and a green checkmark), "Parent location group" (a dropdown menu with an "x" and a downward arrow), and "Email verification" (a toggle switch labeled "User must confirm email"). At the bottom, there are "Cancel" and "Confirm" buttons.

Create user

First name Last name

Email address

Password

Password repeat

Role

Basic User

Parent location group

Email verification

☒ User must confirm email

Cancel Confirm

Create user dialog

Text description of this image

## ✓ Summary

**Preparation (Points 1–2):** Use an aggregator account in the web portal `reduxi.app`. Open **Global Settings** in the left navigation.

**Locations and controllers (Point 3):** Create location groups. Link an unowned controller or a P1 meter to a new location.

**Owners and access (Point 4):** Assign or remove the owner in **OEM Devices**. Grant View, Edit or Control access per location.

**Users (Point 5):** Create users with a role and a parent location group. Every person who needs access requires a user.

## → Common issues

| ISSUE                                         | SOLUTION                                                                                                                                                                        |
|-----------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Global Settings is not visible                | The menu item only appears for aggregator accounts. Request an aggregator role from the relevant manager.                                                                       |
| The controller cannot be linked to a location | The controller must be unowned. Check the <b>OEM Devices</b> menu. To free it, remove the owner with the red X or disconnect it from its location with the disconnect icon.     |
| A user cannot see the installation in the app | Without user access, the installation is not shown. Create a user for the person and assign a parent location group, or grant access in the <b>Access</b> area of the location. |

## → Related articles

Matching guides from the Reduxi knowledge base:



### How to add users to your organization in Reduxi Cloud

Add users to your organization in Reduxi Cloud.



### Device setup guides

All step-by-step guides for connecting devices to the Reduxi Controller



### Strategies for the Reduxi Controller

Energy manager and other strategies explained