

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

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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

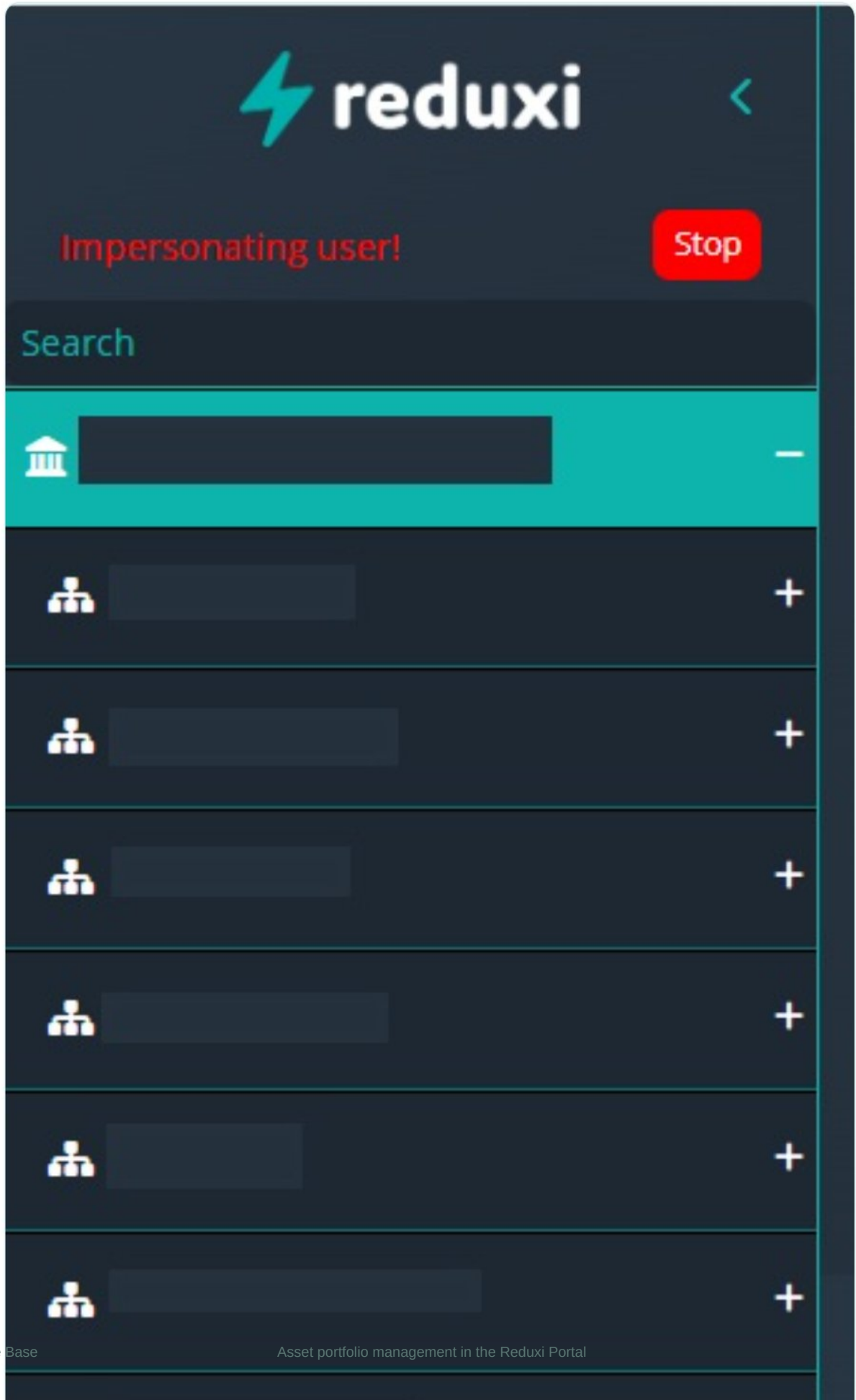
This kind of management works best in the web portal reduxi.app. Managing locations, controllers and users in the mobile app quickly becomes hard to follow.

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**.

The screenshot shows the Reduxi Global Settings page. The left sidebar contains navigation links: Home, Global Settings (selected), Locations & Groups, OEM devices, and Users. The main content area is titled 'Global Settings' and is divided into three sections: Basic Info, Other, and Additional Info. The Basic Info section contains fields for Name, Contact Email, Contact Phone, Support Email, Sales Contact, Support URL, and Software License Policy URL. The Other section contains fields for Product Name, Platform Name, Platform Name, Slogan, Domain, Privacy Policy URL, and Terms & Conditions URL. The Additional Info section contains a field for Default Location Group and a field for Registration URL.

Basic account information: company name, URL and address

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
4117		0	1
5714		0	1
6319		0	0

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

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-RG5W	4792			20260114114843000	●
☒ P1 Wifi	P100-001K-SL4V-RJK0	4794			20260513000000000	●
Controller	V7EJ JYAO-2QRA-RPF1	4843			20260422133553000	●
Controller	L0BV 9E0F-SOD4-8Y15	5190			20260224125936000	●
Controller	3WDT-KCKO-20QD-S1E6	5829			20260707085758000	●
Controller	IDLR-F4VE-FVYX-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

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-SL4V-N3T4	4285			20260114114843000	●

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

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



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

... / Locations & Groups / Locations

Reduxi devices + Assign controller + Assign P1 Wifi

ID	Is connected	Device ID	Options
4843	✓		🔌 ➔

Owner

Owner

Access

← Invite user

Invited user	Invited by	Status	Options
No data for table			

Rows per page: 20 0 - 0 of 0 Back Next

+ Add user access

Name	Email	View	Edit	Control	Options
		✓	✓	✓	🔴

Location detail view: device data, owner and access overview

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:

Reduxi devices + Assign controller + Assign P1 Wifi

ID	Is connected	Device ID	Options
4843	✓		🔌 ➔

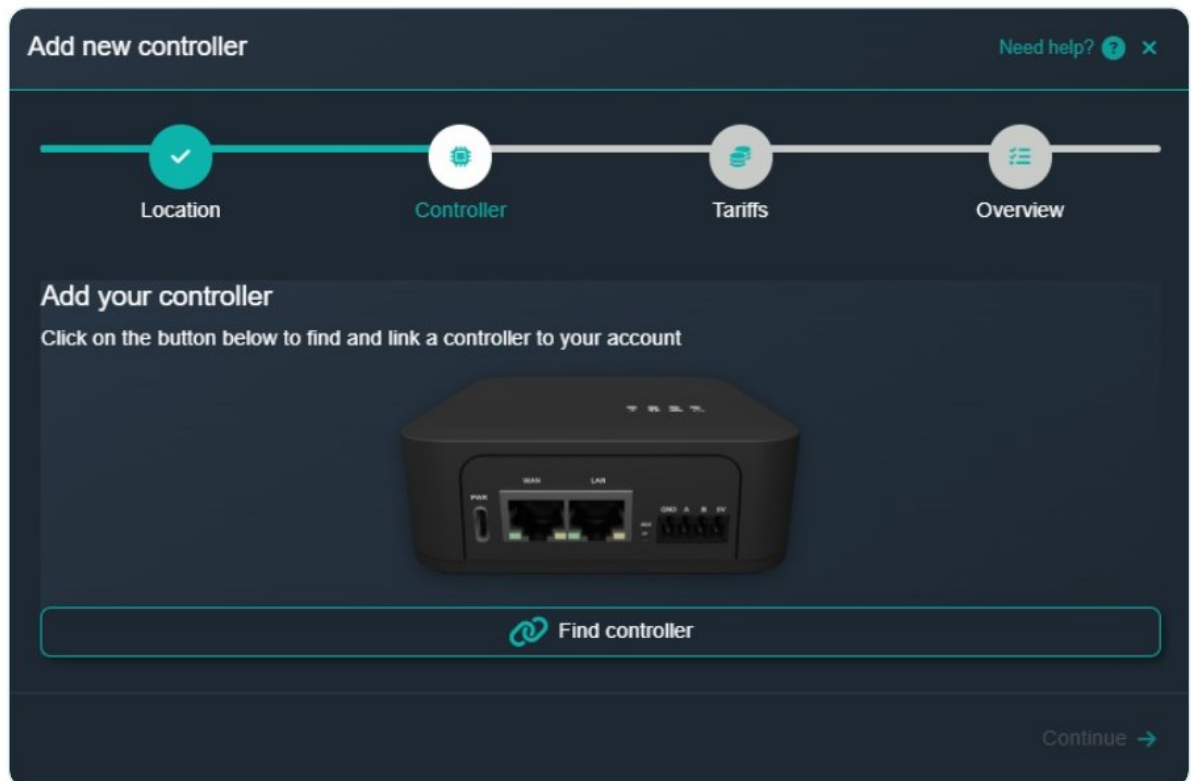
OEM Devices in the location view: **Add Controller** and **Add P1 Wifi**

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

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

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).

Add new controller

Need help? ? x

✓

⚙️

📄

📋

Location

Controller

Tariffs

Overview

⚙️ Controller found

Serial Number:

V7EJ-JYAO-2QRA-RPF1

Software Version:

20260422133553000

Status:

Connected

🔌 Connected devices (3)

🔌 P1 WiFi / Ultra

🔌 Schrack i-CHARGE CION PRO 1

🔌 Schrack i-CHARGE CION PRO 2

Continue →

Controller found, including connected devices

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

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)

The final step summarizes the entries and completes the assignment.

Add new controller
Need help?

✓

Location

✓

Controller

✓

Tariffs

☰

Overview

🏠

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

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



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.

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

✓ 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 OEM Devices 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 Access 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



List of supported devices

All devices that work with the Reduxi Controller



Strategies for the Reduxi Controller

Energy manager and other strategies explained