User guide

Cloud STI-07



IV PRODUKT

Documentation for your unit

1. Go to IV Produkt's order portal, *orderdocs.ivprodukt.com* or scan the QR code.
2. Enter your order number.
3. Press ENTER or click search.
4. Select your order.

Is documentation missing?

Contact

DU@ivprodukt.se

IV PRODUKT CLOUD - USER GUIDE

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1. INTRODUCTION



There are two different subscriptions to choose from: *IV Produkt Cloud Free* and *IV Produkt Cloud Service+*.

1.1 IV produkt Cloud Free



- Completely free subscription
- Connected over the internet
- See status and flow chart and reset alarms
- Service+ included the first month

1.2 IV produkt Cloud Service+



- Full access to change control functions and adjust values
- Alarm notifications, history and upgrades
- Good for balancing and commissioning
- Support capability from us at IV Produkt

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2. CONNECT TO INTERNET

1.3 Internet access

- The Ethernet cable must be connected to the controller's IP connection (T-IP).

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- The controller requires a connection to the Internet, without proxy.
- Port 443 (https) must be open.
- Port 80 (http) must be open.
- Broadband Internet is recommended for the controller due to the program size.
- It is further important that the Internet connection is stable.
  For more information, read here: *IV Produkt Cloud, Connect safely*

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3. PORTAL

1.3.1 Web browser

The browser must support HTML5.

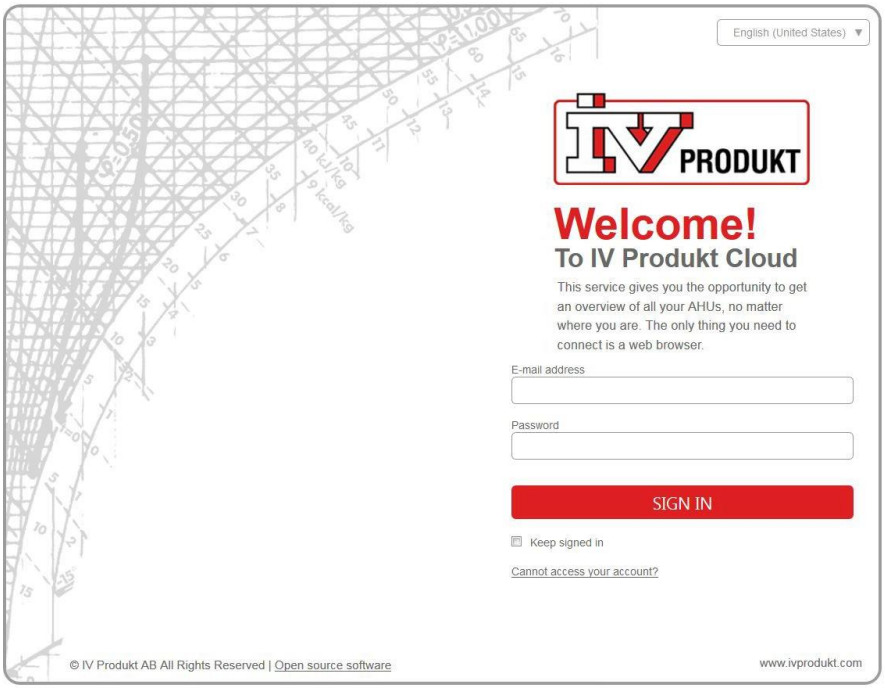
- Google Chrome, Mozilla Firefox, Safari and Microsoft Edge have been tested.



- Internet Explorer is no longer recommended!

1.3.2 Enter the portal

Enter the portal at https://cloud.ivprodukt.com/



1.3.3 Sign in

You have received an email with an invitation and temporary password.

1. Enter the Username and (temporary) password and click “Sign in”. You are requested to change the password.
2. NOTICE! A secure password consists of at least 8 characters and includes at least one letter and one special character. Create and confirm your secure password.
3. Click “Change password” to confirm the change. Your individual password is active, and you are now forwarded to an entry mask.

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1.3.4 Forgotten password

Use the “Reset Password” function if you have forgotten your password and follow the instructions.

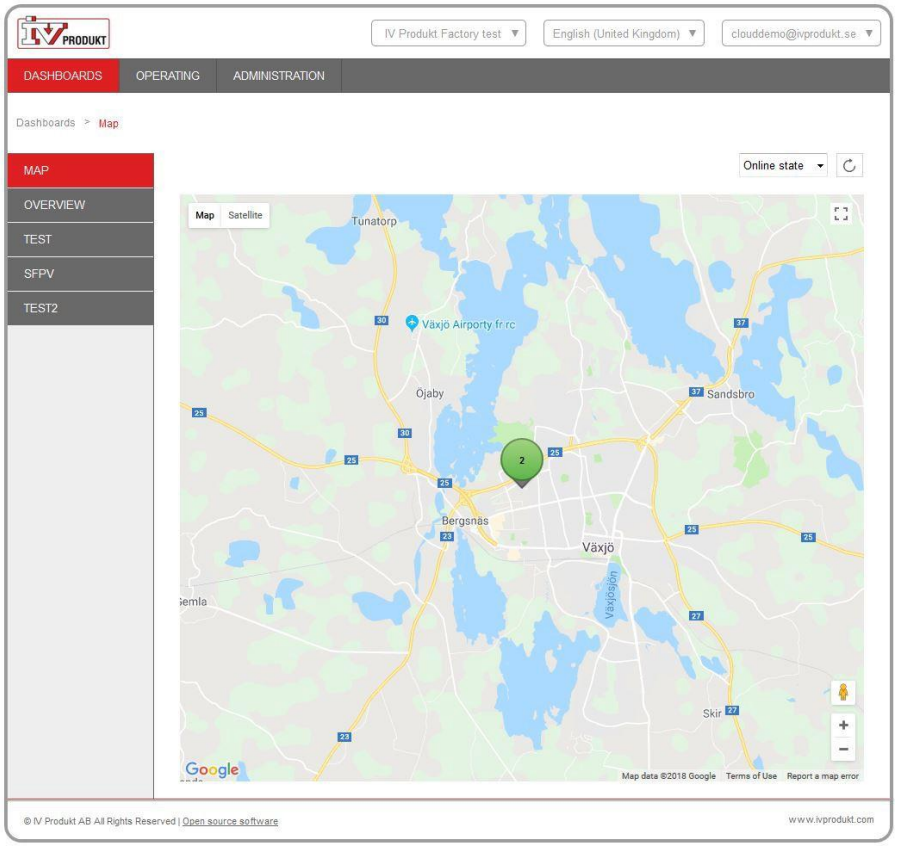
1.3.5 Password

A password shall consist of at least 8 characters and at least one each of the 4 character groups:

* Latin capital letters (A…Z)
* Latin low-case letters (a…z)
* Digits (0…9)
* Non-alphabetic characters (t.ex. !,$,+,?)

1.4 Navigation

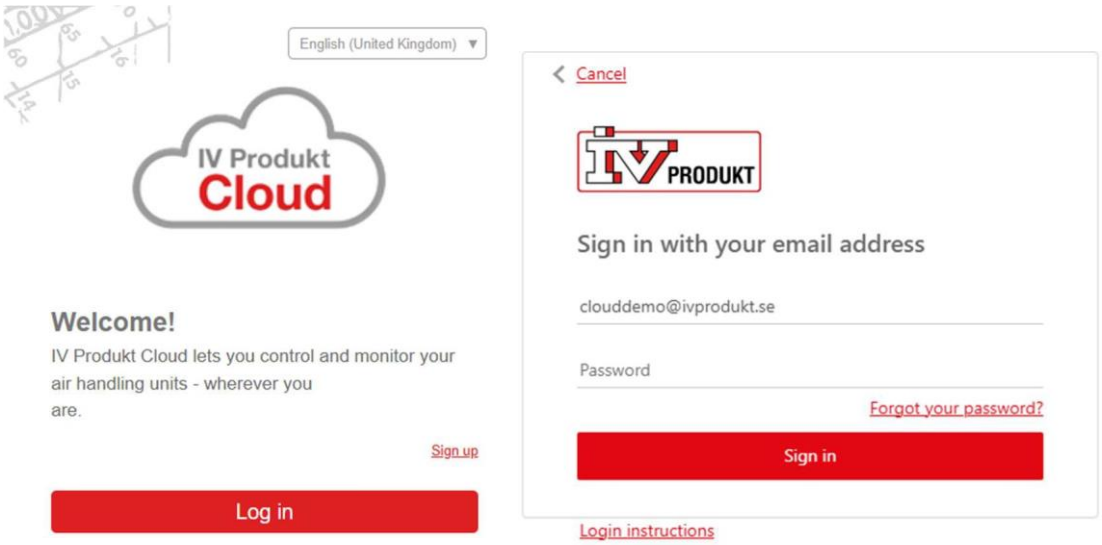
There are two menus, one horizontal and one vertical. Based on what you choose in the horizontal menu, the vertical menu changes. Depending on your user role the menus may vary.



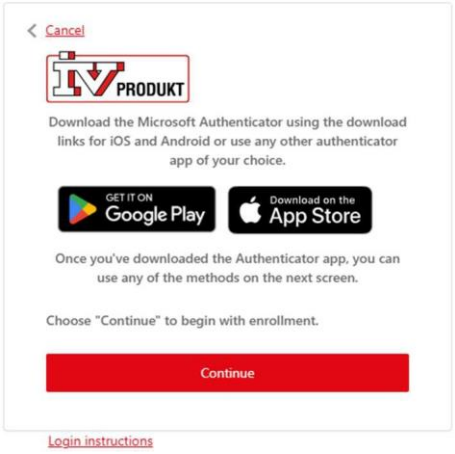
4. MULTI-FACTOR AUTHENTICATION (MFA) IV PRODUKT CLOUD

1.5 Setting up multi-factor authentication

1. Select "**Log in**".



2. Install the Microsoft Authenticator app. If you already have it installed; proceed to step 3.
   - To set up multi-factor authentication you need the Microsoft Authenticator app.



   - Visit Apple App Store or Google Play and search for "Microsoft Authenticator". Download the app and open when installed.



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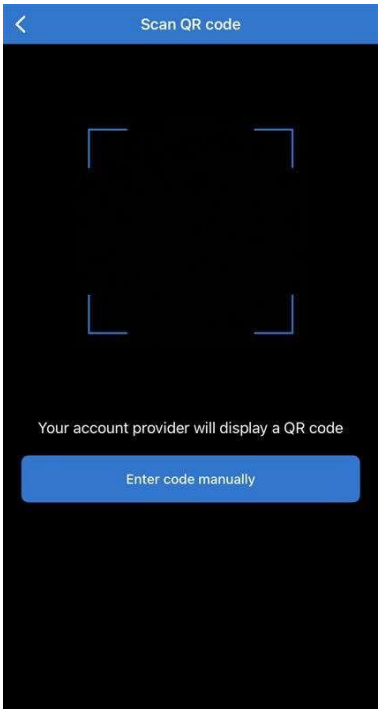
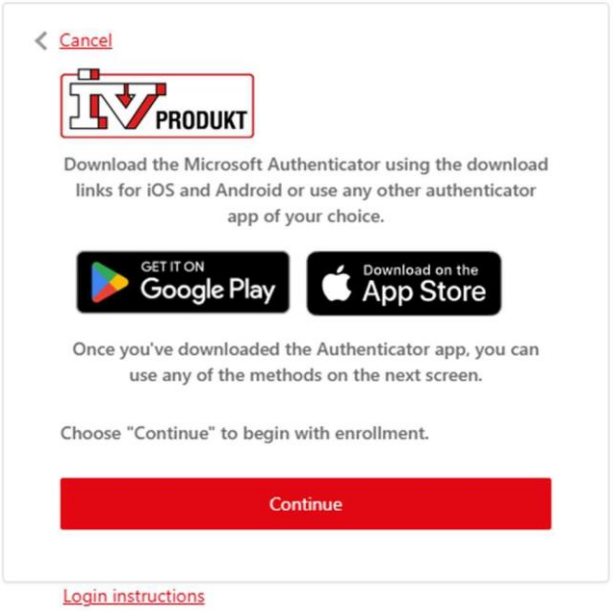
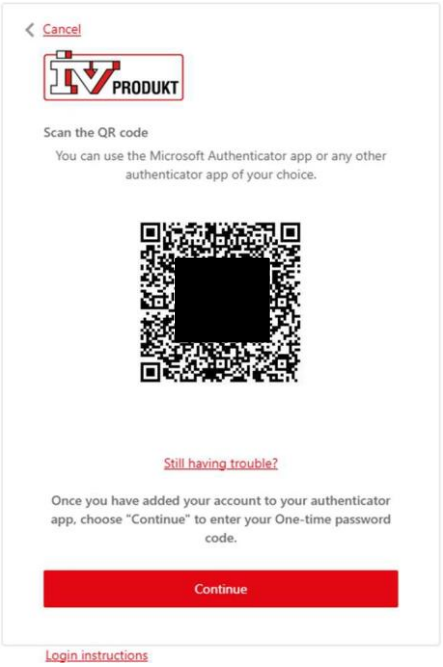
3. Add your account in Microsoft Authenticator
   - When the app is open, select "**Scan a QR code**".
     (If you cannot see "Scan QR code", select + on the upper right and select "Other account".
   - You may be prompted to allow access to camera – select "**OK**".
   - You will see square on the screen used for scanning QR codes.





4. Return to IV Produkt Cloud
   - Select "**Continue**".
   - A QR code is shown.





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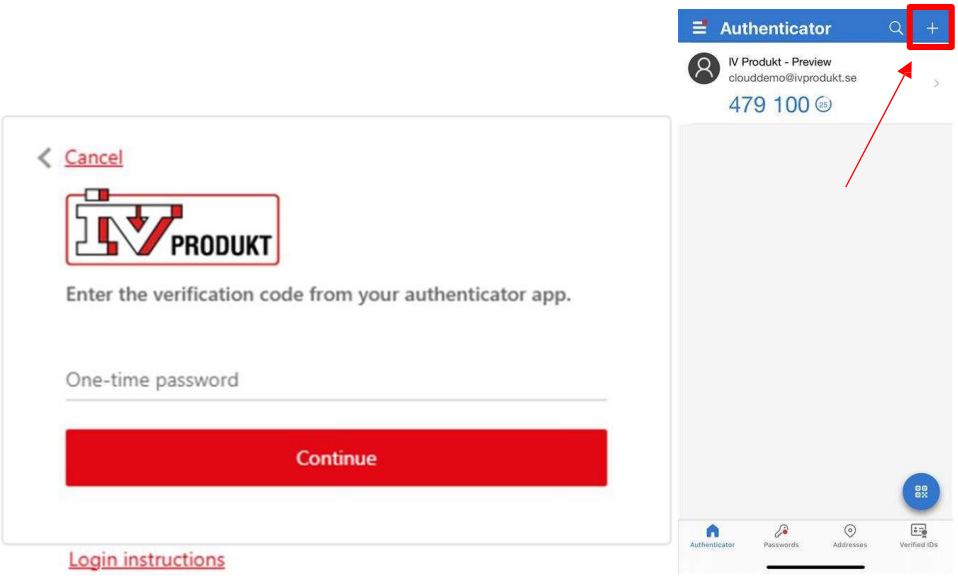
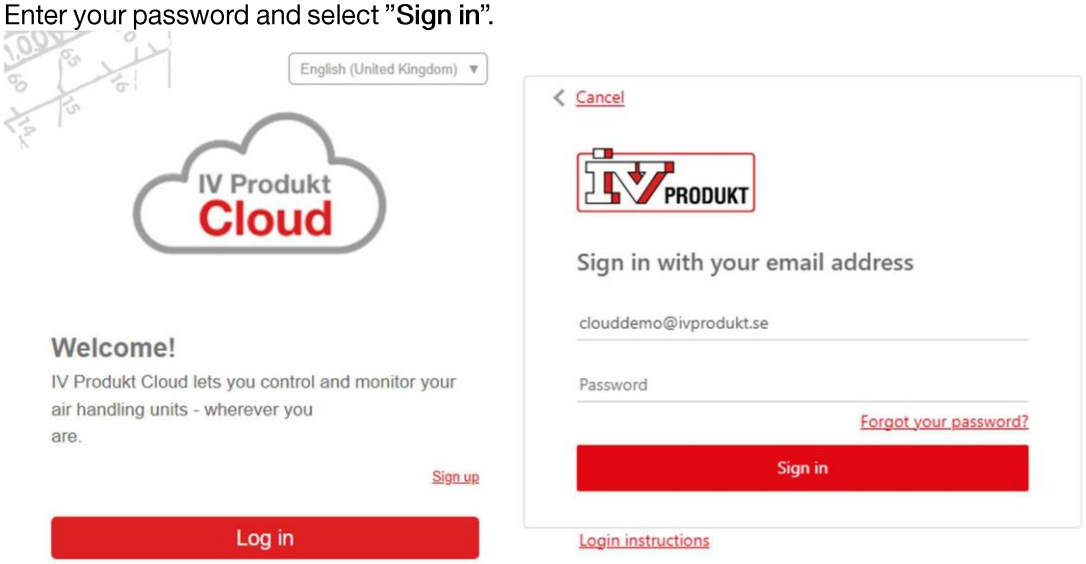
5. Scan the QR code with Microsoft Authenticator
   - Open Microsoft Authenticator again.
   - Aim the camera at the QR code on the screen.
   - Microsoft Authenticator automatically creates and registers a multi-factor authentication account.
   - Select "**Continue**" after scanning the QR code.

6. Finish the setup
   - Enter the six-digit code shown in Microsoft Authenticator. Note that the code is updated every 30 seconds.
   - Select "**Continue**" to finish the sign-in.



1.6 Signing in with Microsoft Authenticator

1. Signing in with e-mail address
   - Select "**Log in**".
   - Enter your password and select "**Sign in**".



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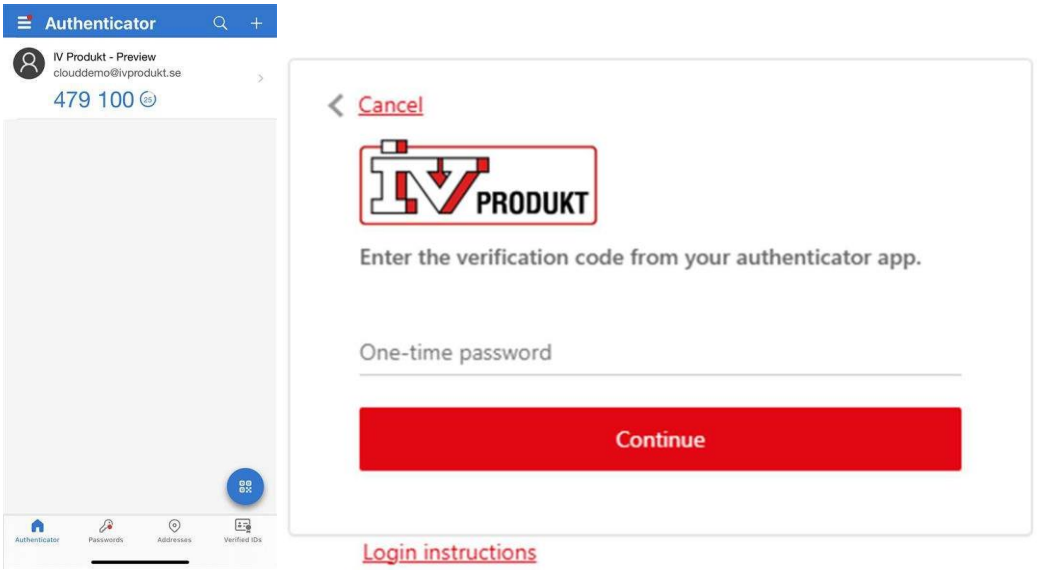
2. Enter your multi-factor authentication code
   Open ”Microsoft Authenticator”.

- Enter the multi-factor authentication code.
- Select “**Continue**”.



1.7 Lost MFA device / unable to sign in

If your phone with Microsoft Authenticator is lost or broken. Select ”Reset one-time password” after entering your e-mail address and password. This is forwarded to IV Produkt to decide whether multi-factor authenticaion can be safely reset. Feedback within in 24h during work days.

Deviations and changes to text and graphics may occur.

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5. ACTIVATE IV PRODUKT CLOUD



In order for Cloud to work, Climatix hardware is required from year 2009 along with software version AHU v3.60 or EHP v3.28 or higher. Climatix with older software versions is possible to upgrade to the latest version.

5.1. Activate IV Produkt Cloud in Climatix

1. Log in using password *2000*. (If you have a Touch screen, see instructions on how to log in here: *Touch screen Login*. Select “Operations” on the Touch screen to access the menu options below.)
2. Place the network cable into the socket *Internet access* (Ethernet), enter the menu: (-V3.58) *Mainmenu -> System Overview -> Communication -> IP-Config.*:
   (V4.00-V4.22) *Main Menu -> System Overview -> Communications -> IP-Config.*: (V4.24-) *System settings -> Communications -> IP-Config.*:
   If using dynamic IP > make sure you have an IP address.
   If using static IP: Set *DHCP -> Passive* then set IP address, netmask, gateway address and DNS. Do a *Restart -> Execute*. Then make sure you have the correct IP address, network mask, and gateway address.
3. Enter Menu:
   (-V3.58) *Mainmenu -> System Overview -> Communication -> Climatix IC -> Enable -> Yes*
   (V4.00-V4.22) *Main Menu -> System Overview -> Communications -> Climatix IC -> Enable -> Yes*
   (V4.24-) *System settings -> Communications -> IV Produkt Cloud -> Enable -> Yes* Check that “state” is “connected” (or “OK” in some versions), **The activation key** can be found in the same menu. (In Climatix earlier than V3.58, you must enter menu *Other settings* to find the activation key.)
   For units delivered after October 2021, the activation key can be found under *order specific documentation.*
   Make a **Restart** (A restart is easiest made in the menu:
   (-V3.58-V4.22) Mainmenu -> System overview -> Save / load -> Restart required! -> Execute).
   (V4.24-) System settings -> Save / load -> Restart required ! -> Execute).

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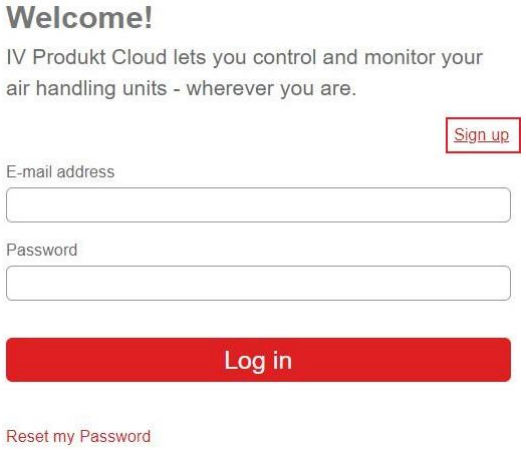
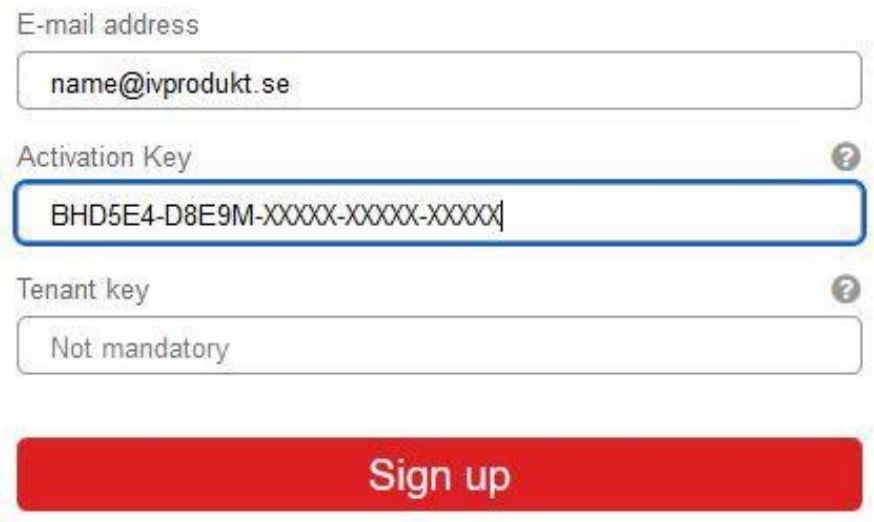
5.2. Activate your unit in IV Produkt Cloud

1. **Wait at least 5 minutes** after you have activated IV Produkt Cloud in Climatix. Go to the website: *https://cloud.ivprodukt.com*
   Select **“Sign up”**.



2. Enter you e-mail address and the activation key you found in the hand unit. Leave “Tenant key” blank, if you don't have a customer account in Digital Wallet.



3. If you are already an IV Product Cloud user, the unit will be added to your existing user account. If you are a new user, you will receive login information to the specified e-mail address. Log in using this login information. You will be asked to change your password - do so and log in with your new password.
4. Fill in information about your unit under the administration tab.
   Name - for example IV Produkt's order number for your unit.
   Description - The name of the unit.
   Application set - On newer units this will be set automatically, else select the unit's application set depending on type of unit and language.
   Address - Find the address using “Find the address” there you can make a search and select the correct address.
   Timezone - Timezone where the unit is located.
   Select **“Activate”** in the right upper corner.

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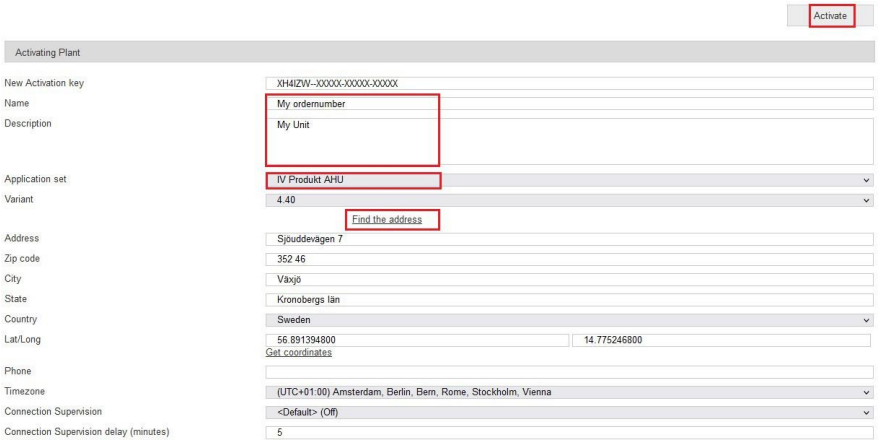

5. Now it's done!
   The *Service+* subscription is activated for free for one month, and then automatically switches to *IV Produkt Cloud Free*. IV Produkt Cloud Free allows you to see status for the unit, but you can not change anything or see historical values or trends. Contact us at IV Produkt *cloud@ivprodukt.se* if you want to buy IV Produkt Cloud Service+.

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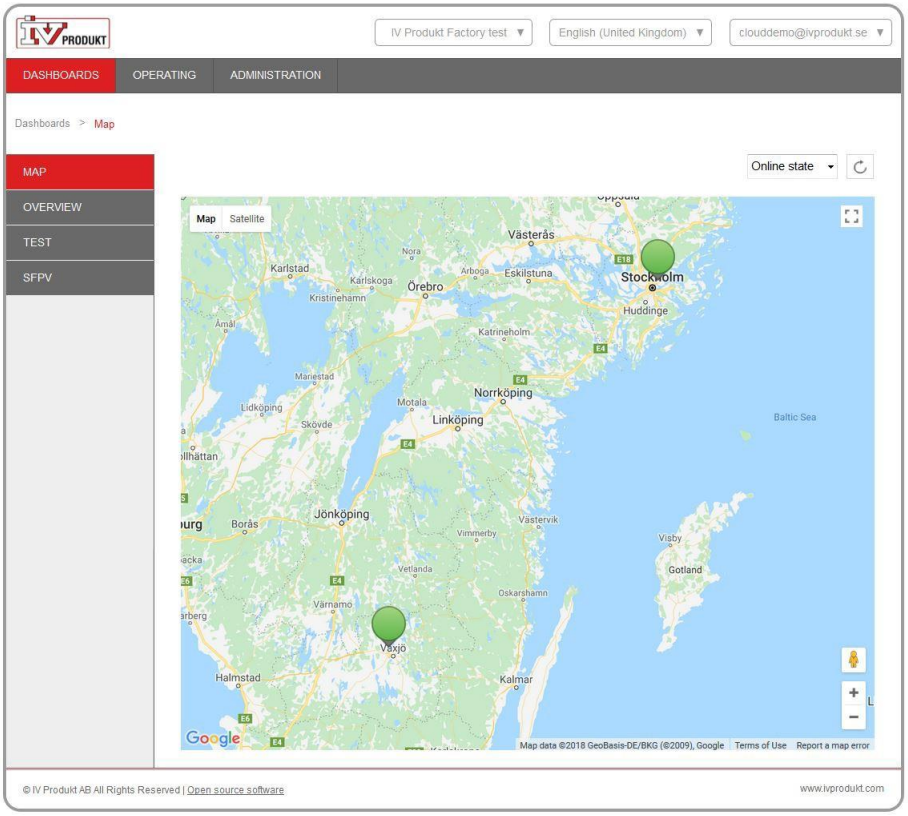
6. DASHBOARDS

6.1. Map

“Map” displays the geographic location of your plant.

Click on the balloon and you can go directly from the map to the data points and settings.



- Green balloon – Plant is okay.
- Yellow balloon – Warning or operation mode (For example: Low prio alarm mode, soon filter change, night cooling, night heating, start-up…)
- Red balloon – Alarm or operation mode (For example: off mode, not online, high prio alarm, clogged filters…).

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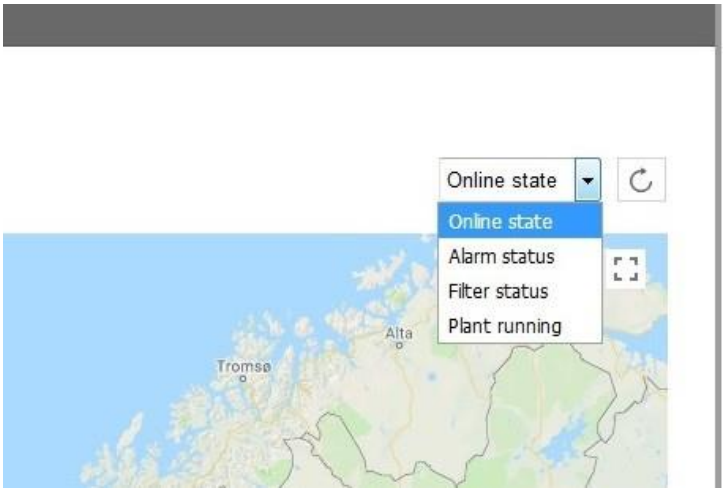
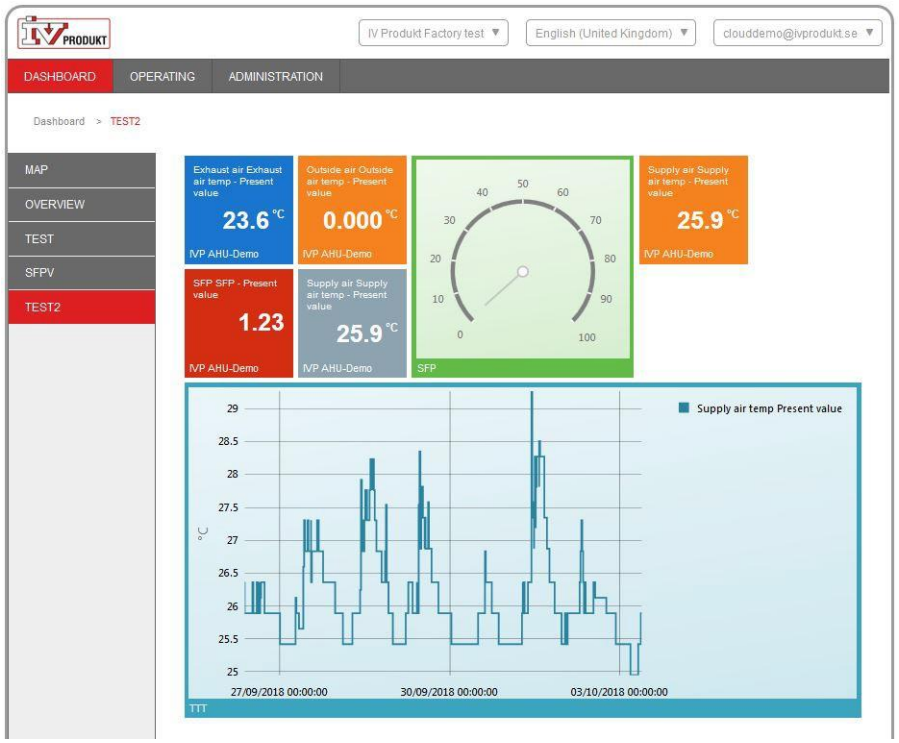
Different status indicators can be selected in the upper right corner.



6.2. Overview - Create your own Dashboard

“Dashboard” for your plant.

- Your configurable “Dashboard” or favorites page.
- Individual data points or entire menus can be displayed as tiles. The tiles can be arranged and sized to individual needs.
- Share your own dashboard with other users or create individualized dashboard for each user role.



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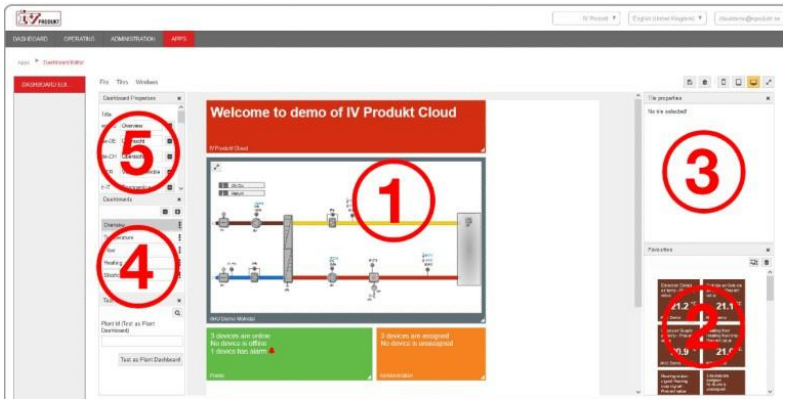
6.2.1. *Dashboard Editor*

Enter the menu “Apps” to reach the “Dashboard editor”, where you can configure your dashboard.

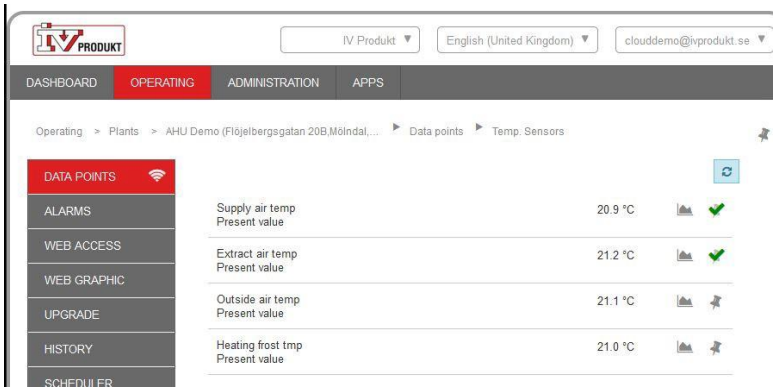


1. Workspace
2. Favorites
3. Tile Properties
4. Dashboards
5. Dashboard properties

6.2.2. *Favorites*

The “Favorites” menu window is the interface for moving and saving data points and tiles between the plant lists, the workspace, and various dashboard.

Click the “add to dashboard”-icon  for any menu or data point, that has the icon, to add it to the Dashboard.



Your data points will now appear in the “Favorites”-window in the “Dashboard editor”.

You can drag created tiles from the workspace to “Favorites” for later use in other dashboards.

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6.2.3. Workspace symbols and menus

6.2.3.1. Symbols

Symbols	
	Full screen mode.
	You can view the workspace in various display formats to simulate the view of a finished dashboard (narrow to viewing on mobile devices, medium for viewing on tablets or wide for viewing on a desktop)
	The dashboard is temporarily saved to the browser cache. Otherwise, your changes are lost when exiting the Dashboard Editor.

6.2.3.2. File (menu)

Menyn “File”	
New	A new dashboard is created. **NOTICE!** All existing dashboard are deleted from the editor and you will lose everything on the workspace.
Import	Imports a dashboard that has previously been exported.
Export	Export all dashboards in the editor. This generates a JSON file and saves it to your default download folder. Rename the target file to identify and reuse your dashboard package. **NOTICE!** Export the existing dashboard from the user dashboard to an external file as a backup copy before creating a new dashboard.
Import User Dashboard	Import an existing dashboard to the editor.
Save as User Dashboard	The selected user dashboard will be displayed via 'Dashboard > Overview'. **NOTICE!** This will overwrite any user dashboards in 'Dashboard > Overview'. There is no 'Undo' function and the delete is permanent.

6.2.3.3. Tiles (menu)

Adding and removing tiles to/from workspace.

6.2.3.4. *Windows (menu)*

In the menu “Windows” you can choose which windows you want to be visible.

1.7.1 Handle tiles

6.2.3.5. Select

Click on a tile on the workspace to select it. A small, red, triangle displays in the upper right-hand corner of the tile. Select multiple tiles with Shift-key and mouse click.

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6.2.3.6. *Move*

Drag the tile to the desired location.

Press the Ctrl-key to move tiles between windows (for example workspace, favorites and charts).

6.2.3.7. *Resize*

Select the white triangle in the lower right-hand corner of an enabled tile. Drag the triangle across the workspace to scale the enabled tile. The tile changes size based on the direction.

6.2.3.8. *Delete*

Use the Delete-key on the keyboard.

6.2.4. *Create Dashboard*

In the “Dashboards” window select the plus sign to add a new dashboard. Select the minus sign to delete a dashboard. You can also right-click to bring up the options to add or remove a dashboard.

The name of the instrument panel is specified in the “Dashboard Properties” window. It is possible to have several languages, select the language you use, press the plus sign and enter the name of the dashboard. Press minus sign on languages you do not want to use.

6.2.5. *Create diagram*

1. Right-click on the workspace and select “Add new tile”.
2. Select “Line Tile”.
3. Drag-and-drop one or more data points from “Favorites” to the new chart. The data points are processed and diplayed as the selected type.
4. In the window “Tile properties” you can enter the appropriate data.

Tile properties	
Tab	**Function**
Default	Select the token and tile color.
Datapoints	Adjust the name of the data points. With the plus sign you can add new data points.
Axis	New data points, a new designation as well as minimum and maximum values for the vertical axis.
Line Chart	Refresh intervalls and timeframe.
Legend	Position of the key.

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6.2.6. *Create Flow Chart*

1. Right-click on the workspace and select “Add new tile”.
2. Select “Webpicture Tile”.
3. Select the tile and in the “Tile Properties” window, select tab “Webpicture” and click on the magnifying glass.
4. Find your unit in the list that appears. Click on the plus sign and select the svg-file that appears under your unit.
5. Select “Default” tab and click in the “Title” box. Select the appropriate token or write a heading for the flow image.
   Setup and operate a multipane tile

A 'Multipane Chart Tile' is a tile that includes multiple line charts.
Multipane tile has the following benefits:

- Common settings for the monitoring period.
- Common data export.
- In the stacked view, interactions and differences in data are easier to identify than on individual charts.

Prerequisite: At least 2 line chart tiles, each with data points, are created on the dashboard.

1. In the workspace, left-click and select 'Add Tile', select 'Multipane Chart Tile'.
2. Select all the charts to be included in the 'Multipane Chart Tile' by holding down the Shift- key and right-clicking on the charts.
3. Press Ctrl-key drag your charts to the 'Multipane Chart Tile'.
4. Highlight the 'Multipane Chart Tile' and 'Edit Tile' to ensure that both charts were actually set up.
5. Save and select “Save as User Dashboard”. NOTICE! This will overwrite any user dashboards in 'Dashboard > Overview'. There is no 'Undo' function and the delete is permanent.
6. Exit the editor and go to the “Dashboard” menu. Find your multipane tile.
7. Right-click on the tile and select 'Show Trend Viewer in a new tab'. Now your multipane chart should appear in a new tab in your browser.

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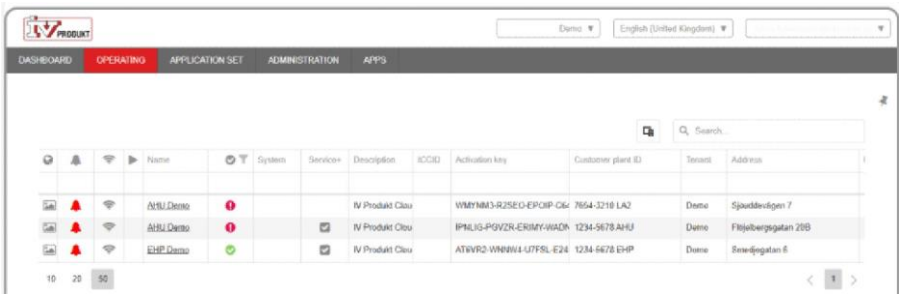
7. OPERATING

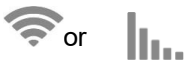
7.1. Plant Overview

Available plants are displayed in the “Operating” menu.



The plants are identified by different columns e.g. name, description, application set, address, alarm and online status.

7.1.1. *Symbols*

Symbol	Description/Function
	At least one alarm is active. If you click the symbol, you will reach the alarm list
	Alarm confirmed, but the issue has not been resolved
	Plant is online
	Shows web grapic
	The unit is in Service+.
	Performing activity (e.g. upload data)

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7.1.2. Search

To quickly find a plant use the search function to search displayed as well as hided columns. Delete the search term from the search field to once again view the entire list.

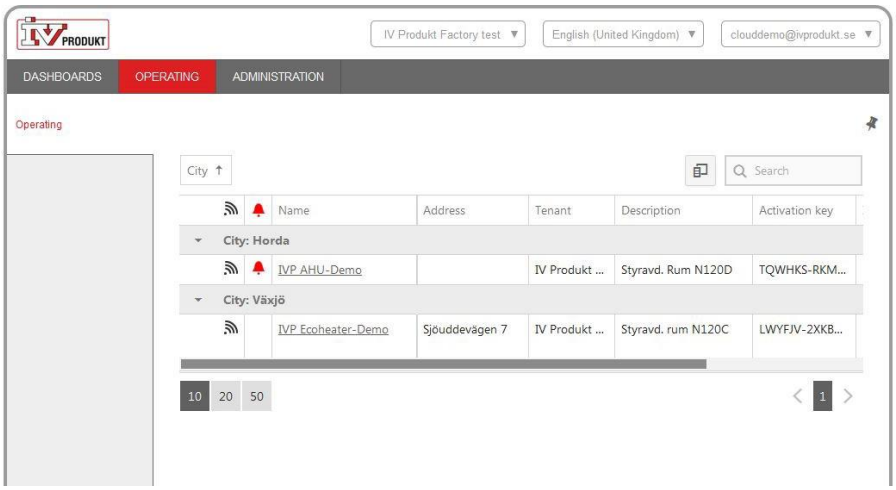
7.1.3. *Column selection and sort*

Optimize your overviews by showing or hide columns as needed. Enable by selecting the “column picker” and drag-and-drop it from the table to the box and vice versa. These selections are saved to your user profile. Of course, lists can also be sorted. If the sort arrow is not displayed, simply click the corresponding header line.

7.1.4. *Group*

Create groups to get an even better overview.

- Drag a column header to the white space above the table to group. Grouping cascades are also possible for up to 4 levels.
- To reset grouping, drag the grouping criterion (bellow showed “City”) to the table it once again reverts to the column heading.
- Select the unit you want to operate, then a new menu appears.



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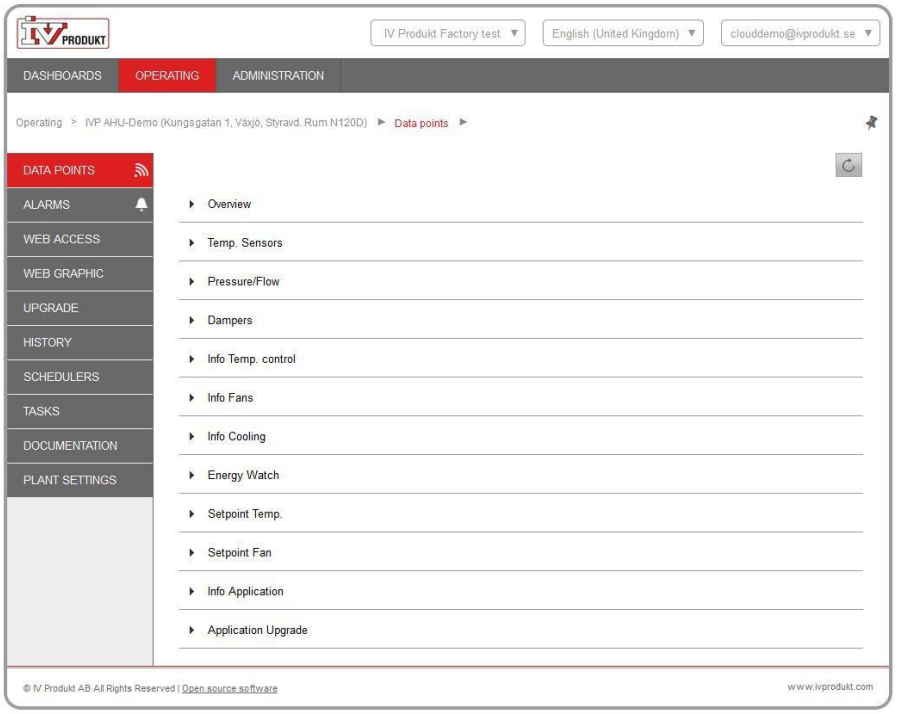
7.2. Data Points

Users see the plant data points as per their user role.

- Go to an individual data point through data point grouping.



7.2.1. *History trend data*

Click the trend symbol  to display the trend viewer on history data. You can export the data to your local PC as .csv.



The number of measured values that are saved is a maximum of 40,000 or a maximum of 1 year back in time, depending on which occurs first.

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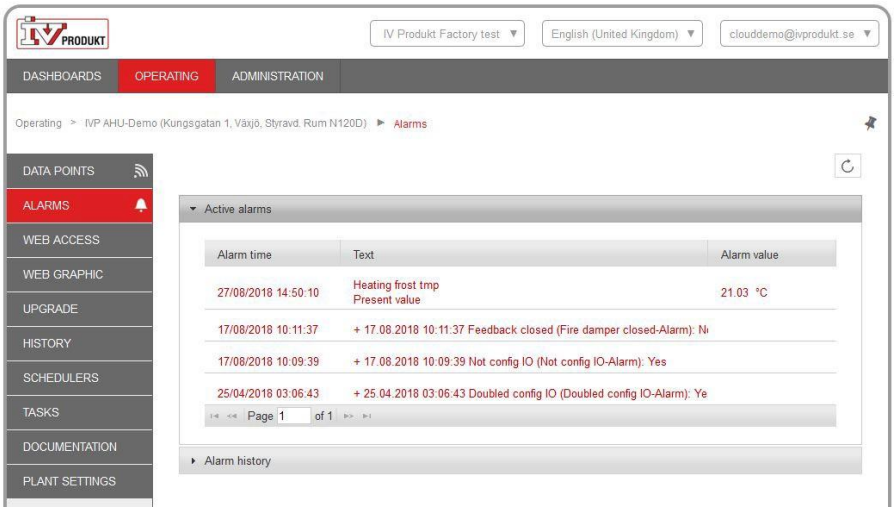
7.3. Alarms

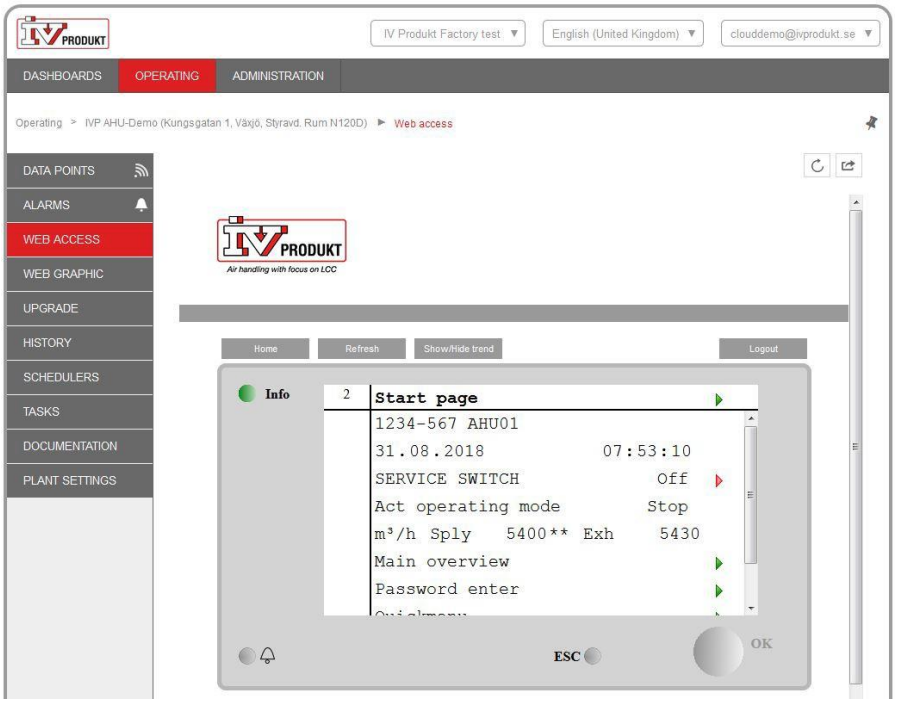
Plants enter their alarms under “Active alarms”. The alarm is transferred to “Alarm history” once the alarm is reset.

Alarms can be reset under Data Points – Overview.



7.4. Web Access

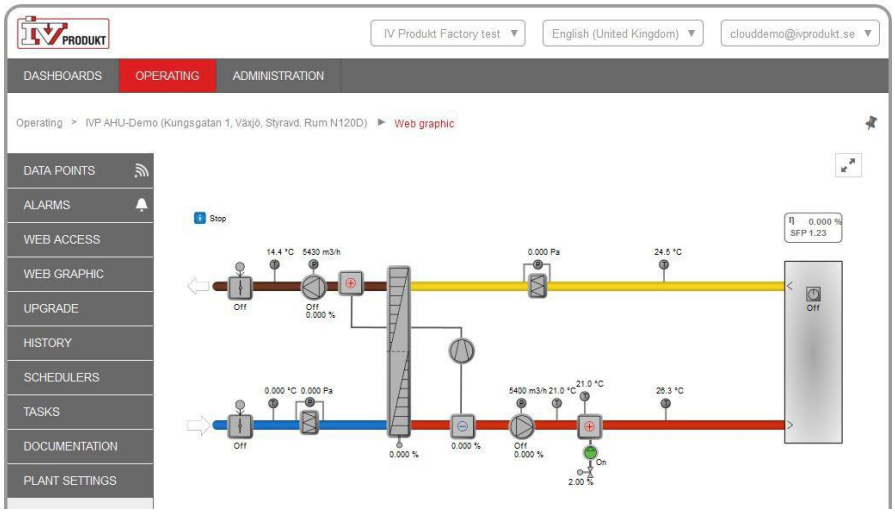
Users can see a full emulation of the local (physical) HMI.
The remote operator has the same menus as the local user.



Ongoing product development may entail changes without prior notice

7.5. Web Graphic

Web graphic shows a principal picture. Depending on unit configuration, this may vary from actual layout.



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7.6. Upgrade

An authorized user can remotely upgrade a complete Climatix system.

This includes:

- backing up parameters (commissioning data)
- upgrading firmware and applications
- restoring original parameters

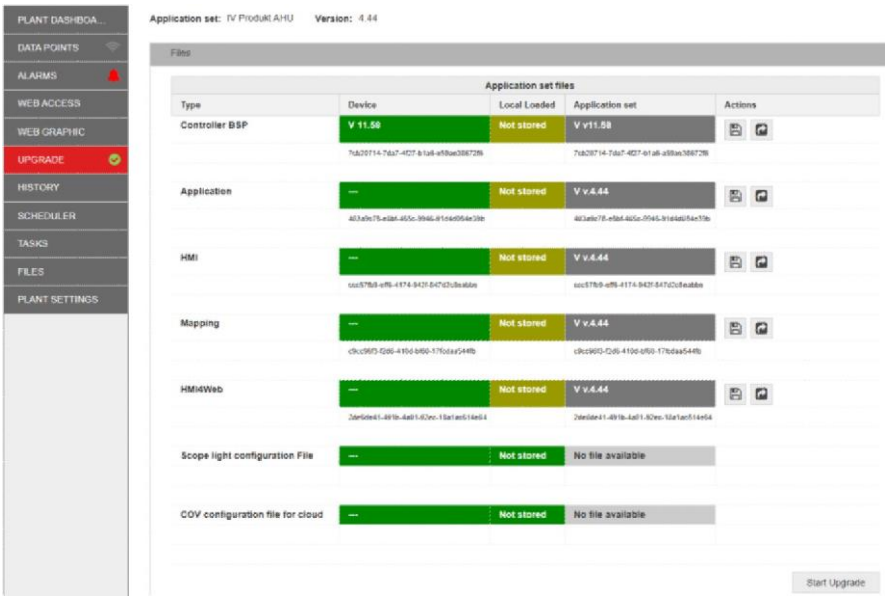
“Upgrade” displays the actual situation on the controller (left side) versus the assigned application set (to the right).

The status overview includes:

- Current version on the device (left side)
- Local files (middle) loaded on the controller/SD card
- Files from the application set (right side)

The status overview has the following color code:

- Green: The file loaded on the controller (or SD card) matches the file in the application set.
- Red: The file loaded on the controller (or SD card) does not match the file in the application set.
- Olive green: The file saved on the controller (or SD card) matches the file in the application set, but is not loaded.
- Gray: Source files in Cloud.



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7.6.1. *Save parameter file*

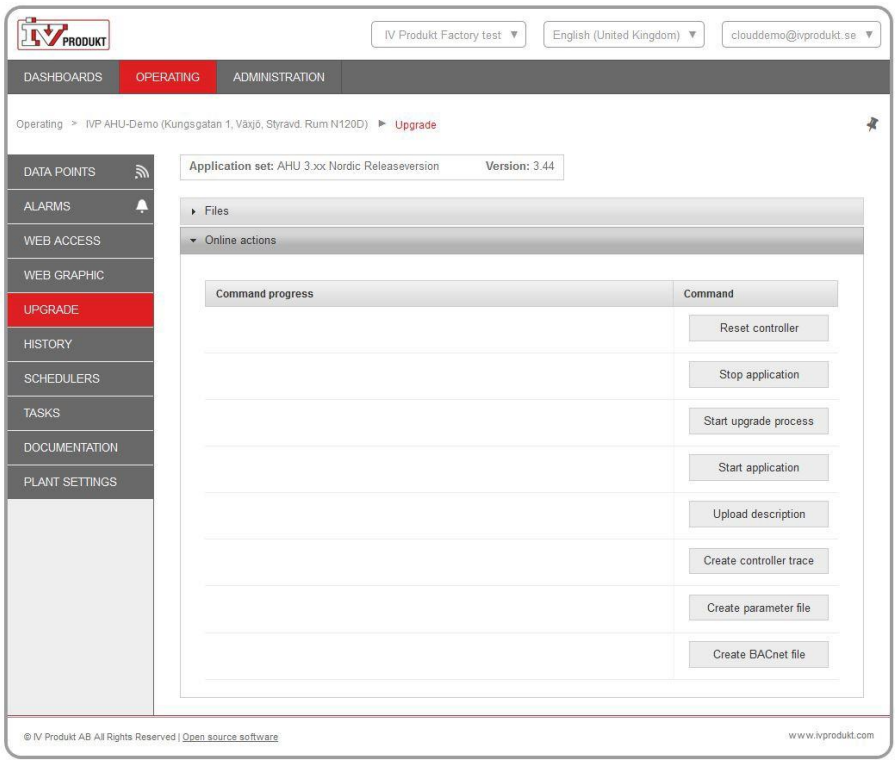
It is recommended that you save your parameter file as backup.

To save your parameter file:

1. Select the “Online Actions” tab at the bottom of the page.
2. Select “Create parameter file” and wait until “OK” appears. You can access the parameter file under the “Files” tab.

With the download symbol you can download the parameter file to your computer.

The load symbol is used to load the parameter file into the controller.



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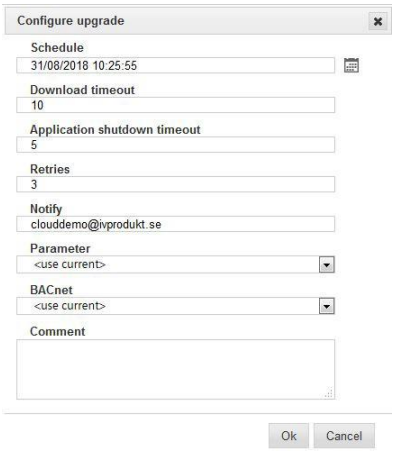
7.6.2. *Upgrade application/firmware*

Use the **“Start upgrade process”**, under the “Files” tab. You can set the upgrade to a specific date/time to start it automatically.



7.6.2.1. *Possible settings*

Setting	Description
Schedule	Date/time of the scheduled upgrade
Download timeout	Timeout for the file download to the controller (in minutes)
Application shutdown timeout	Timeout for controller shutdown in minutes
Retries	Number of permitted update retries
Notify	Email address for the upgrade report. Use a semicolon to separate multiple recipients.
Parameter	Parameter used for the upgrade
Comment	Free text comment on upgrade (displays in the task list)

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7.6.2.2. Upgrade progress

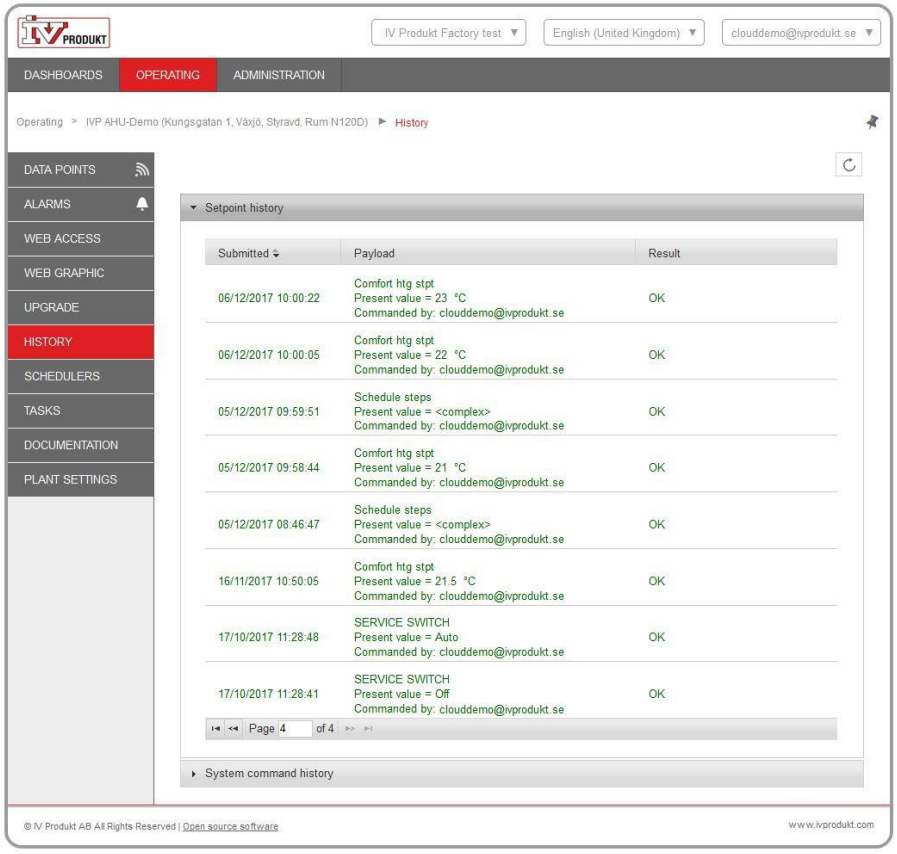
The plant is updated after these 11 steps. The defined email recipient receives a report on the results of the upgrade. The upgrade progress can be followed in the Tasks menu.

1. All necessary downloads are executed.
2. Upgrade query to the controller. The application must be shut down during a defined time. “Application shutdown timeout” can be configured for each upgrade.
3. The changes are saved to the Cloud. They are restored after the upgrade.
4. The BACnet file is saved to the Cloud. The file is restored after the upgrade. Note: “Upload failed:1” displays is BACnet is not used.
5. Stops the application.
6. The actual upgrade with the downloaded files.
7. Automatic controller restart.
8. Starts the application.
9. Parameters are restored.
10. Automatic controller restart.
11. Parameters are restored.

7.7. History

The “Plant log” (history) consists of two parts:

- Setpoint history: Who changed the setpoint remotely and when.
- System command history: Who remotely changed system files and when, e.g. due to upgrades or restore parameters.



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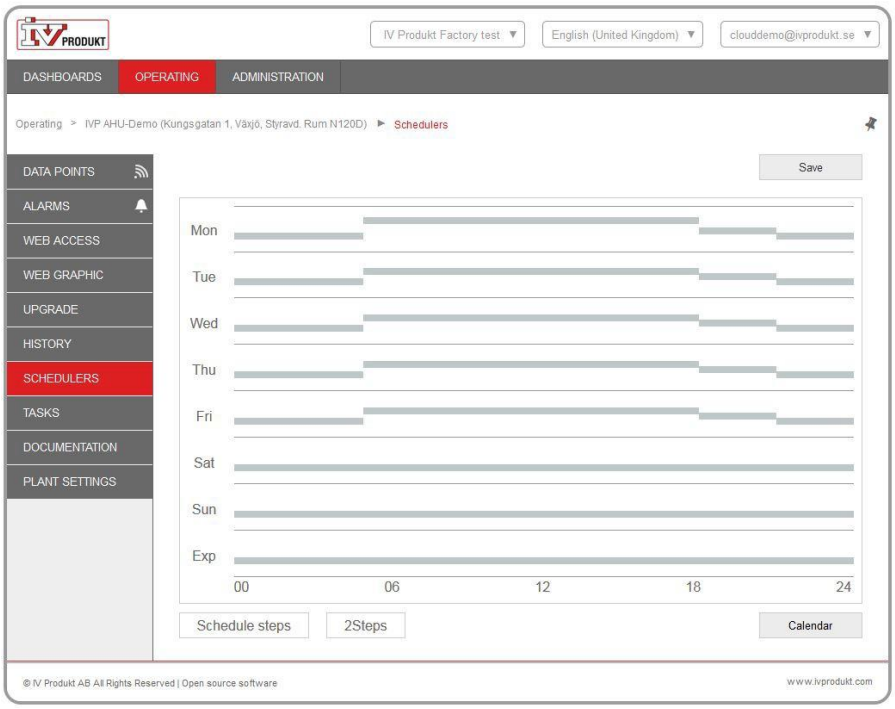
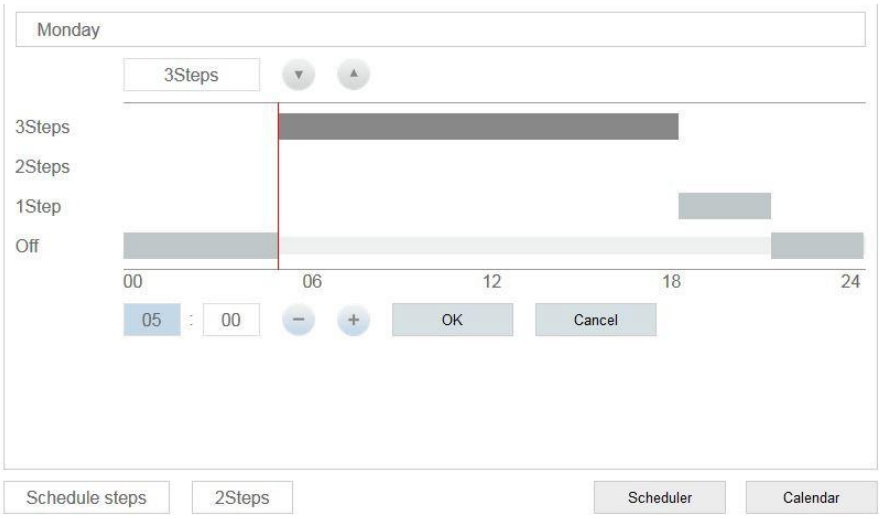
7.8. Schedules

The user can remotely edit available schedulers or calendars.



The user selects the desired day and adjusts the time scheduler accordingly.



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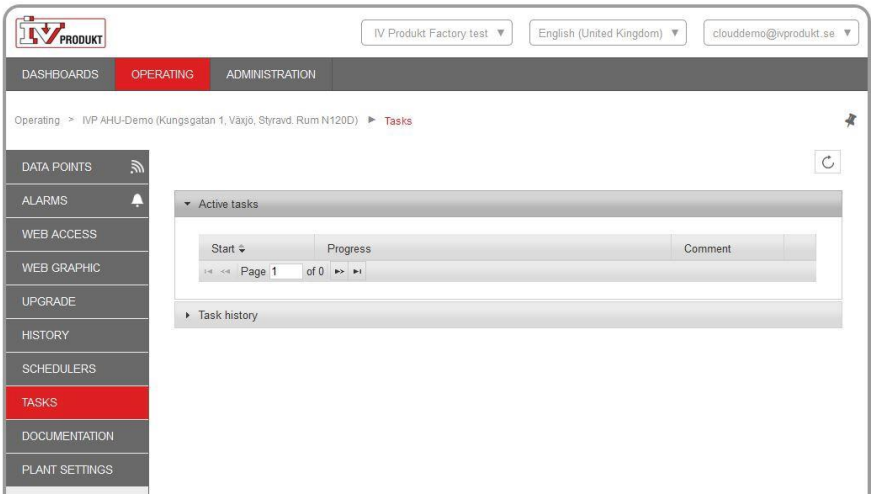
7.9. Tasks

- The “Active tasks” window displays scheduled plant updates.
- The “Task history” window permits subsequent analysis.

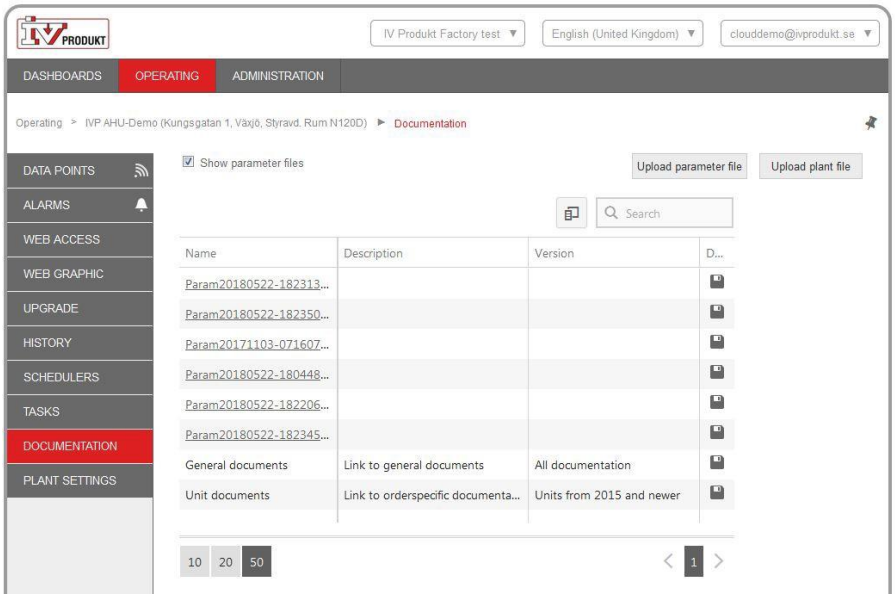


7.10. Documentation

General documents – a link to *IV Produkt web documentation.*

Unit documents – a link to the *unit's unique documentation.*

The unit's saved parameter files are displayed here. You can rename them by clicking on the desired file and changing the name (for example “commissioning parameters”).



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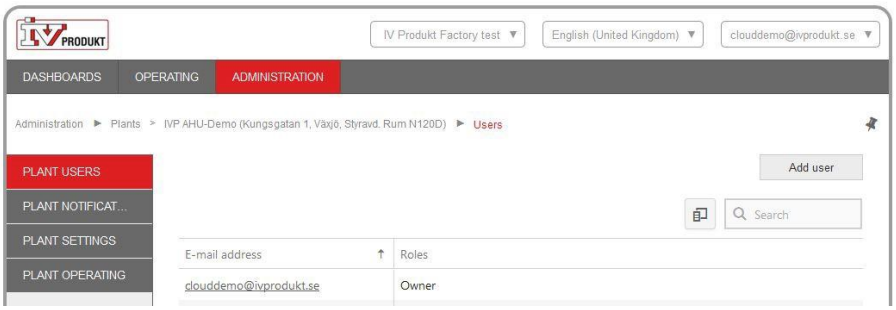
8. ADMINISTRATION

8.1. Plant Users

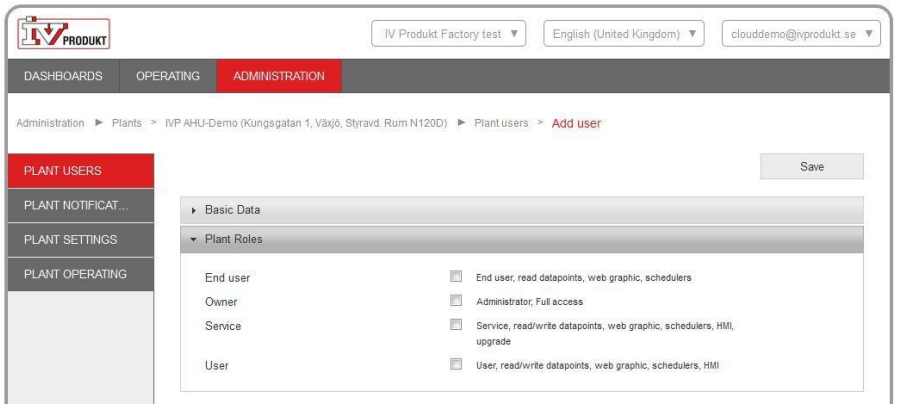
Select the unit you want to administrate, then a new menu appears.



8.1.1. *Add a new user*

1. Select “Add user”.
2. Enter the email address and select a plant role depending on how much you want the person to be able to access.
3. Press Save.

The new user will receive an email with login details.



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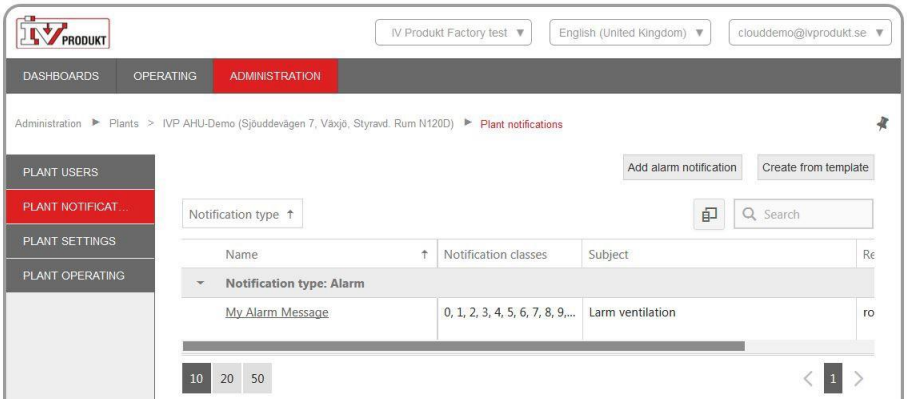
8.2. Plant Notification

Create an alarm message:

1. Select “Add alarm notification”.



Message - Here you can type text and/or click the message tokens (to the left). The token “AlarmText” contains information of the alarm e.g. Alarm frost protection sensor.



Tip! Click the button “Send test message” to see what it looks like.

2. Enter desired and unwanted times for sending a notification under “Alarm times” and “Excluded dates”.
   Enter desired alarms under “Alarm classes”.
   Alarm class 0 (danger) and 1 (critical) is A-alarm
   Alarm class 2 (low) is B-alarm
   Alarm class 3 (warning) is C-alarm
   Others are not used.
3. Press Save.

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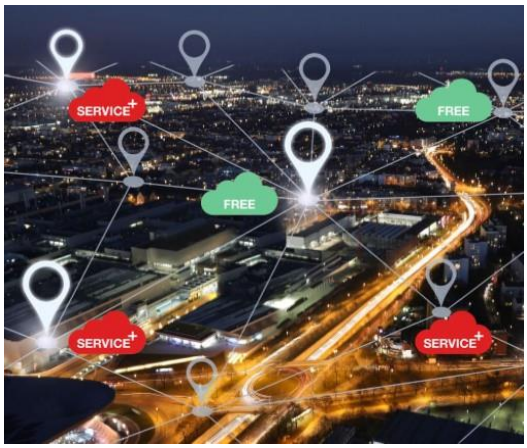
9. DIGITAL WALLET

9.1. What is Digital Wallet?

For you who have several units with Service+ and want to manage your account yourself. You can activate and deactivate Service+ yourself acording to your needs.

Contact IV Produkt if you want your own Digital Wallet account.



9.2. Benefits with Digital Wallet

- Get access to your own customer account for IV Product Cloud
- Manage your own units
- No annual subscriptions
- Cost-effective - activate and deactivate Service+ yourself according to your needs (1 month subscription time)
- Order *credits* when needed and distribute freely between your facilities

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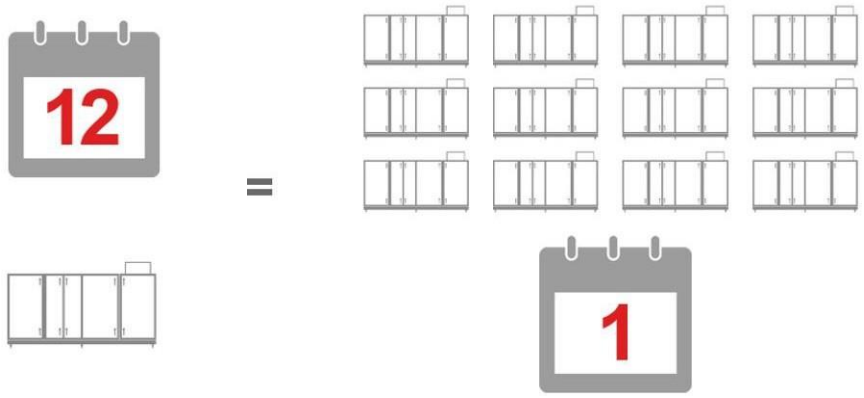
9.3. Credits



9.3.1. *Distribute your credits as you wish*

- Credits are used to activate the full version of Service+
- Service+ costs 20 credits per month/unit
- When activating Service+, the subscription time is 1 month
- You will receive a monthly report and credit balance by email
- Buy credits and distribute between your units according to your needs



To have a unit in Service+ for 12 months, costs as many credits as having 12 units in Service+ for one month.

9.3.2. *Credit packages*

If you want to order credits, send an e-mail to cloud@vprodukt.se

Our credit packages:

- 240 credits (For example 1 pce AHU 1 year or 12 pces AHU 1 month)
- 480 credits (For example 1 pce AHU 2 year or 24 pces AHU 1 month)
- 1200 credits (For example 1 pce AHU 5 years or 5 pces AHU 1 year)
- 2400 credits (For example 1 pce AHU 10 years or 10 pces AHU 1 year)
- 12000 credits (For example 1 pce AHU 50 years or 50 pces AHU 1 year)

9.3.3. *View Available Credits*

Log in to your Cloud account. Navigate to the “Digital Wallet” menu, and in the “Overview” submenu, you’ll see your credit balance displayed at the top. In “History”, you can view your previous credit transactions, and in “Forecast”, you’ll see how many credits you are likely to use.

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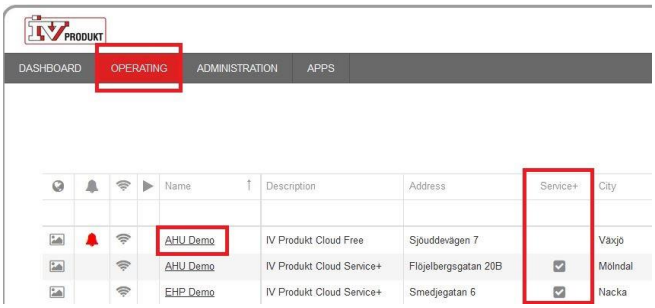
9.4. Activate and deactivate Service+

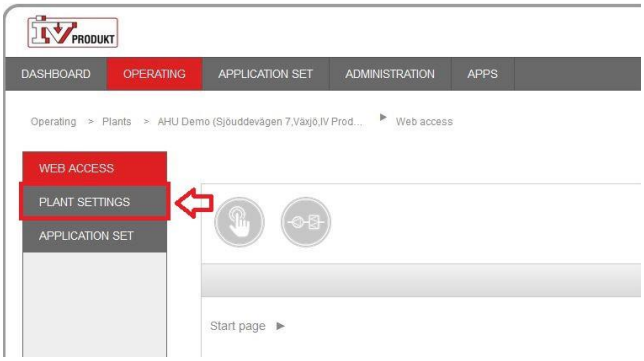


9.4.1. *How to activate Service+ on a unit*

1. Select menu “OPERATING”. In the Service+ column you can see which units are in Service+
2. Select the unit on which Service+ is to be activated



3. Select “PLANT SETTINGS”



4. Enter the number of months you want to activate Service+, or enter 0 to have Service+ always active. check the box.
5. Click “Save”.

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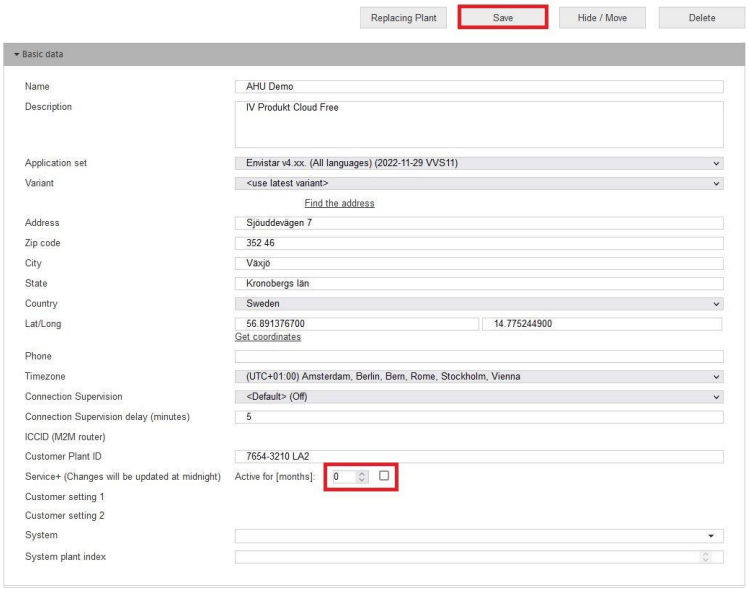
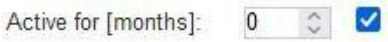
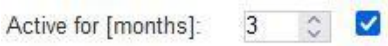


If 0 months is selected, Service+ is always active, but it is possible to deactivate Service+ whenever you want, however, you have a subscription time of 1 month



If you select X months, Service+ is active and locked only during these months and it is not possible to deactivate Service+ during this time



Uncheck the box to deactivate Service+

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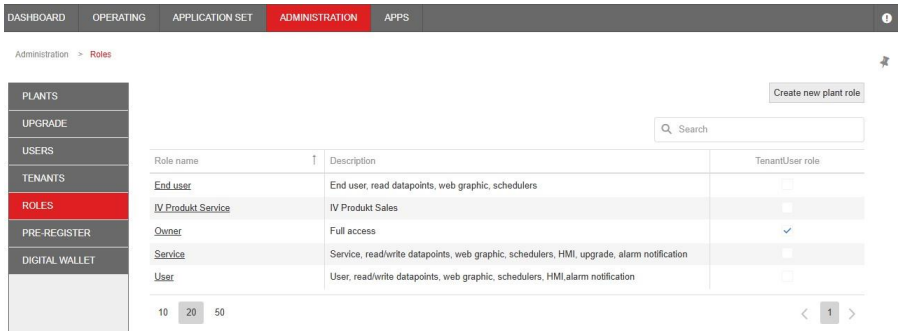
9.5. Roles and Tenants

9.5.1. *Roles*

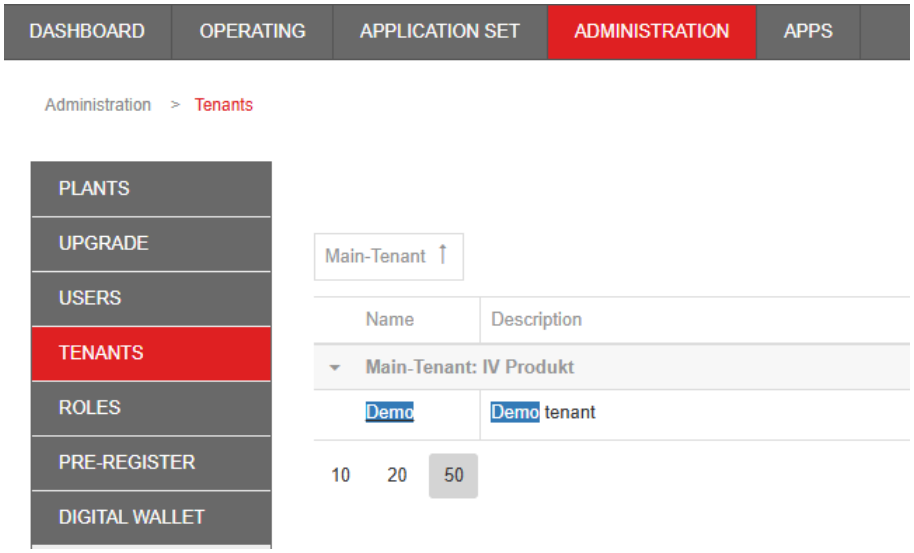
As a user of the Digital Wallet, you can add or modify permissions for user groups (roles). We



recommend doing this in consultation with IV Produkt.

9.5.2. *Tenants*

This menu can be found under “Administration”. Select your tenant from the list that appears (in the example below, it's “Demo”), and more options will then become available.



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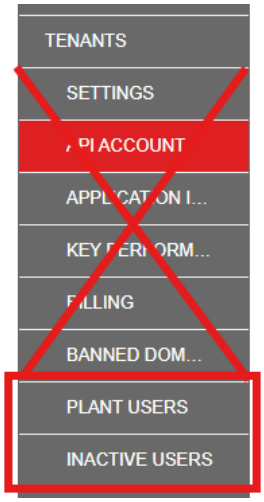
We recommend not making any changes in these menus except for “Plant Users” and “Inactive Users”.



9.5.2.1. *Plant users*

Here you can search for users, delete users, or add a user to multiple units.

9.5.2.2. *Inactive users*

Here you can see which users have been inactive for an extended period of time.

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Feel free to contact us

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