

Monitoring Associated Accounts – Application Note

Revision History

- Version 2.0, April 2024: Updated images and procedures
- Version 1.0, April 2016: Initial release

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Overview

PV sites that are registered and managed in the SolarEdge Monitoring portal can be accessed and monitored by third parties utilizing the Associated Accounts feature. Installers can grant access to a third party at any time and can control access rights for any site.

Associated access can be used with third parties, for example:

- Financiers/lenders
- Monitoring service providers
- On-field service sub-contractors
- Regional distributors providing support for installers

Below are some examples where installers can utilize associated accounts:

- An installer gives a service provider access to monitor a PV site and relevant systems. The two accounts are connected as associated accounts.
- An investor would like to monitor a system they have invested in, but it is owned and managed by an installer. The installer and the investor connect as associated accounts and the installer grants the investor access to systems where the investor is involved. The investor can connect with multiple installers and oversee all systems regardless of the system installer.

Associated account users can access selected sites, or all sites, with an installer's authorization. The installer can choose between allowing read-only, or view/edit access to sites. The parties can approve or decline the request to connect as an associated account.

Once connected, the decision to share information depends on who owns the shared sites.



NOTE

If you access data using an API the site list includes sites from associated accounts.

Configure an associated account

To add an associated account:

1. Log in to the [Monitoring Platform](#).
2. On the top right corner, click your Username.
A dropdown list is displayed.
3. Select **My Account**.
4. On the top bar, click the **Associated Accounts** view.

Company Name	Approved on	Access Level	Site access	Delete
SolarBunny	04/16/2019 1:13 PM	View/Edit	All sites	

5. From **Associated Accounts Access**, click **+Add Associated Account**.
The **+Add Associated Account** pop-up is displayed.

+ Add Associated Account ✕

Enter email address of the associated account administrator whom you want to grant access rights

Email: *

Subject: *

Message: *

Dear Sir/Madam,

GoGreen has requested to add your account as an associated account. This request is now pending your approval in SolarEdge Monitoring system under the "Associated Accounts" section in account management module.

Once approved, both you and GoGreen will be able to grant each other access to selected sites. When approving the request no information will be shared.

This will send a request to the other party to connect as an associated account. Associated accounts will be able to grant access to selected sites. Currently no sites are being shared.

6. In the **Email** field, type the email address of the associated account's administrator you want to grant access rights.

7. **Optional.** In the **Subject** field, change the subject.
8. **Optional.** In the **Message** field, change the message.
9. Click **Save**.
The Associated Account invitation is sent by email.

Manage outgoing requests

In the **Associated Account** tab **Outgoing Requests** is displayed. You can recall or resend an outgoing request.

The screenshot shows the 'Associated Accounts' tab in a software interface. It features a navigation bar with tabs: Company Details, Storage Policies, Users, Associated Accounts (selected), Module Models, and Inverter Model. Below the navigation bar, there are three main sections:

- Associated Accounts Access:** A text box explaining that adding an associated account enables shared sites access. It includes a '+ Add Associated Account' button.
- Outgoing Requests:** A table listing outgoing requests. A red arrow points to the 'Recall' and 'Resend' buttons in the 'Actions' column of the first row.

Email	Requested on	Actions
Miles.Davis@Gmail.com	03/21/2016 7:58 AM	Recall Resend
- Associated Accounts:** A table listing approved accounts for sharing site access.

Origin	Company Name	Approved on	Access Level	Sites access	Delete
	Solarbunny	01/19/2016 5:48 PM	View only	Per-site	
	GreenLightGo	03/01/2016 5:48 PM	View only	Per-site	
	Grun und Sauber GmbH	03/17/2016 1:37 PM	View only	All sites	

To recall or resend an outgoing request:

1. Click **Recall**.
The request is canceled and removed from both outgoing and incoming lists. An email is sent to the contact address.
- OR
2. Click **Resend**.
The original email message is resent to the contact address.

Manage incoming requests

In the Associated Account tab, an Incoming Requests section is displayed which includes details of any incoming requests. You can decline or approve the requests.

The screenshot shows the 'Associated Accounts' tab in a software interface. It features a navigation bar with tabs: Company Details, Storage Policies, Users, Associated Accounts (selected), Module Models, and Inverter Model. Below the navigation bar, there are three main sections:

- Associated Accounts Access:** A text box explaining that adding an associated account enables shared sites access. It includes a '+ Add Associated Account' button.
- Incoming Requests:** A table listing incoming requests. A red arrow points to the 'Decline' and 'Approve' buttons in the 'Actions' column of the first row.

Company Name	Requested on	Actions
GoGreen	03/21/2016 7:58 AM	Decline Approve
- Associated Accounts:** A table listing approved accounts for sharing site access.

Origin	Company Name	Approved on	Access Level	Sites access	Delete
	SunnySideUp	02/24/2016 9:58 AM	View only	Per-site	



NOTE

For accounts with multiple administrators, the request can be viewed by all administrators, including administrators, the email is not addressed to.

To approve or decline a message:

1. Click **Approve**, and the following actions take place:

- The request is approved and removed from both incoming and outgoing lists
- The associated account can be viewed on the Associated Accounts list of both parties
- An email is sent to the Associated Account email address

OR

2. Click **Decline**, and the following actions take place:

- A warning message is displayed, asking if you are sure you want to decline eligibility to access the sites
- The request is canceled and removed from both incoming and outgoing lists
- An email is sent to the Associated Account email address



NOTE

When approving an associated account, data is not yet shared. Approving an account only grants site access.

Manage associated accounts

After the request has been approved, the account admin can configure the site's access and level.

To manage associated accounts:

1. In **Associated Accounts**, click the company name.
The **Associated Account Details** pop-up is displayed.

2. In the **Access Control** section, select the applicable control options as described in the following table:

Access Control	Option	Description	Comments
Site access policy	All sites	Grant access to all sites, including future sites.	The selected access level will apply to all the sites. The default is view only. This option requires acknowledgment of a short

Access Control	Option	Description	Comments
			legal disclaimer.
	Per-Site	Grant the other party access to a selected site(s).	Different access levels can be selected for each site.
	Disable	Revoke access from all sites shared with this associated account	This option revokes access to all sites but does not terminate the connection between associated accounts.
Access level limit	View only	The other party can only view the site(s) monitoring information.	
	View/Edit	The other party can view and edit their site's settings.	

3. Click **Save**.

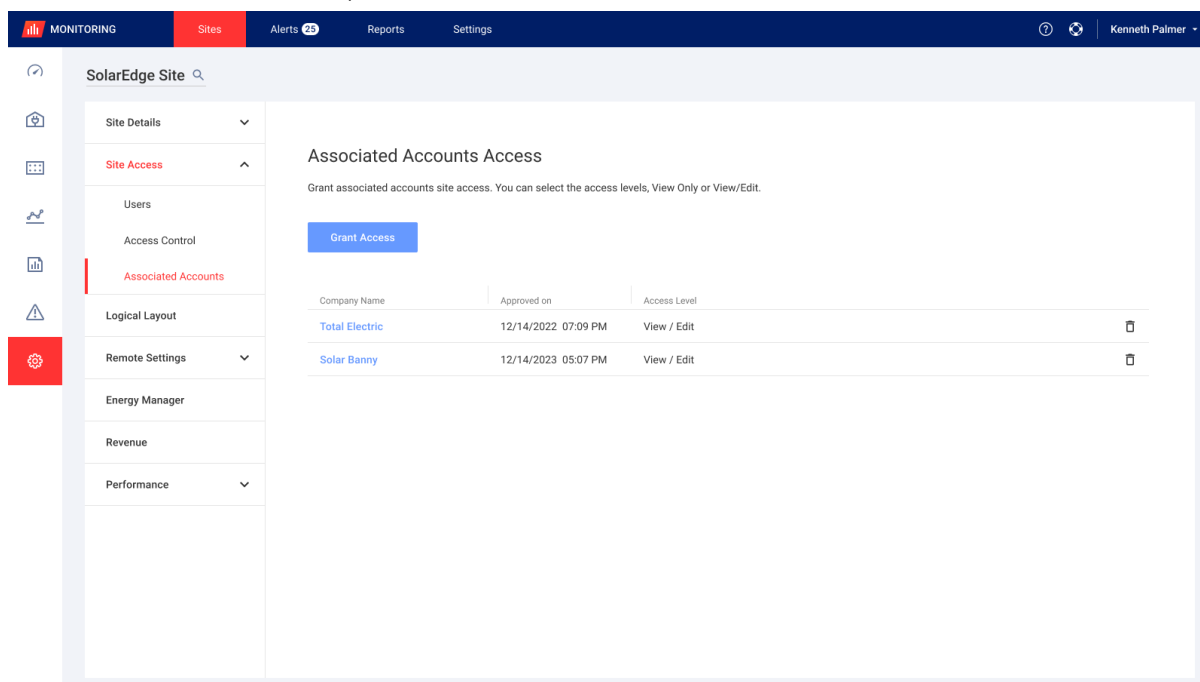
An email is sent notifying the other party that site access is granted or revoked.

Grant access in site admin

If you selected the Per-Site access policy, you give different sites access to different control levels.

To enable access:

1. In the Monitoring Platform, click the **Site Name**.
2. Click the **Admin** view.
3. From the **Admin** menu, click **Site Access > Associated Accounts**.



4. Under **Associated Accounts Access**, click **Grant Access**.

The **Associated Account Access** pop-up is displayed.

Associated Account Access×

Access Level ?

View Only▼

Associated Account

Select Account▼

I certify that I am the legal owner of this system and/or have obtained the authority to share information regarding the Systems with third parties.
I authorize SolarEdge to disclose information and grant access to the information contained on SolarEdge's monitoring portal to the selected associated account ("Recipient").
I understand that the disclosure may contain information about the system(s), including personal information.
I give SolarEdge the right to edit the information contained in SolarEdge's monitoring portal on my behalf (if such rights were explicitly granted).
I agree to release SolarEdge and its officers, directors, contractors, employees, agents, and assignees, from any and all action and damage claims arising from, or in any way connected to the discloser, or any use of information by the recipient.

I confirm I have read the above disclaimer

Cancel

Save

5. From the **Access Level** dropdown list, select **View Only**, or **View/Edit**.
6. From the **Associated Account** dropdown list, select which accounts to grant access to.
7. Read the legal information and select the confirmation checkbox.
8. Click **Save**.
An email is sent to the other party's account administrator.