# Monitoring Associated Accounts – Application Note

## Revision History

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

## Contents

## 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.



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



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.



### 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.



> **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 |

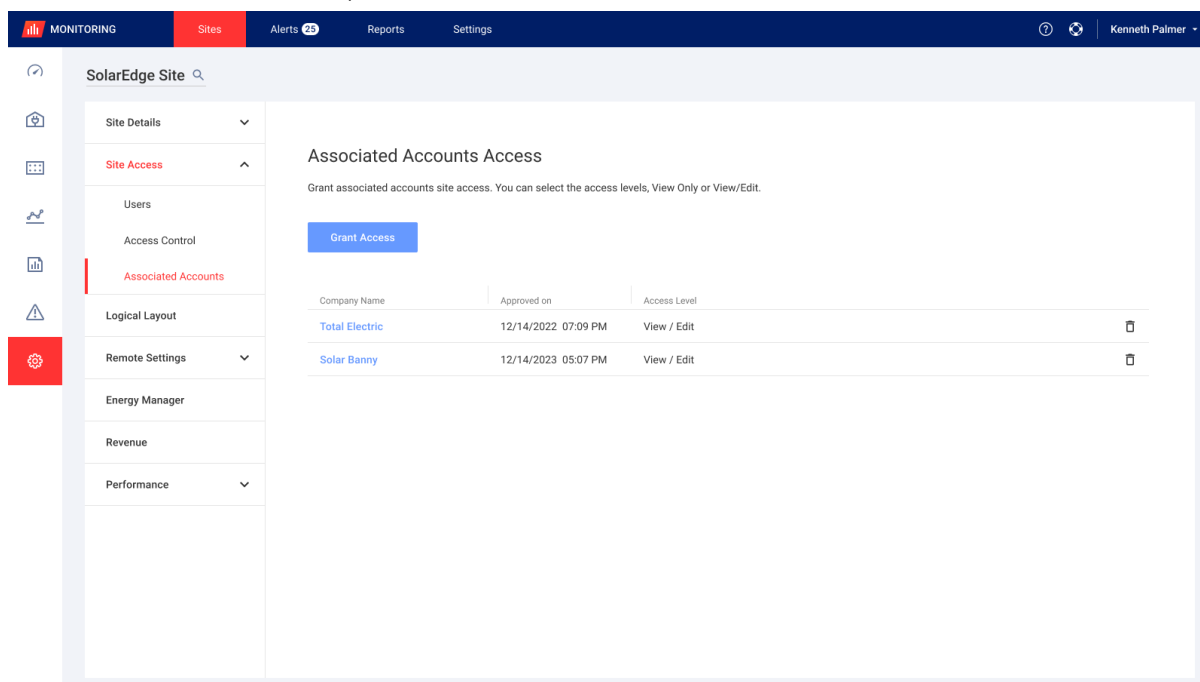| Access Control | Option | Description | Comments |
|---|---|---|---|
| | | | legal disclaimer. |
| | Per-Site | Grant the other party access to a selected site(s). | Different access levels can be selected for each site. |
| | Disable | Revoke access from all sites shared with this associated account | 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.



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.