Monitoring Associated Accounts – Application Note

Introduction

PV sites registered and managed in the SolarEdge monitoring portal can be accessed and monitored by third parties, by utilizing the Associated Accounts feature. Site owners can grant access permission to a third party at any time and control access rights for any site.

This associated access can be used with third parties including:

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

Account administrators can create an association link between these entities.

Examples:

- An installer can grant a monitoring service provider access to a PV site to monitor. Here, the two accounts (installer and monitoring service provider) will be connected as associated accounts and the installer will grant the monitoring service provider access to the relevant systems.

- An investor would like to monitor a system invested in by them but owned and managed by an installer. The installer and the investor will connect as associated accounts and the installer will grant the investor access only to those systems where the investor is involved. The investor can connect with multiple installers and oversee all systems regardless of the system installer for each.

Associated account users can be authorized to access selected owner sites, or all sites. The site owner can choose between allowing read-only or view/edit access to sites.

The parties can approve or decline the request to connect as associated accounts. Once connected, the decision to share depends on who owns the shared sites.

> **NOTE**
>
> When accessing data using an API, the site list will include sites from associated accounts, if access is granted.

Configuring an Associated Account

→ **To add an associated account:**

1. In the monitoring portal home page, under your user name, click **My account.** The account window is displayed.
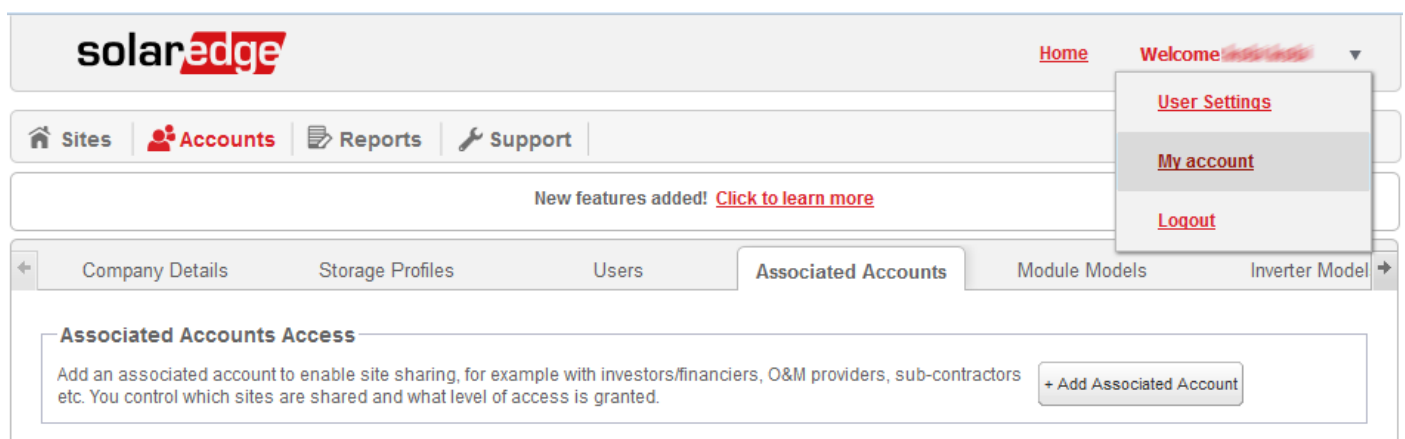
2. Select the Associated Accounts tab.

Figure 1: Associated Accounts tab

3. Click **+Add Associated Account**. The dialog shown in Figure 2 appears.

> 📢 **NOTE**
>
> The requesting user should obtain the admin email address from their business connection.

Figure 2: Add an Associated Account

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

> 📢 **NOTE**
>
> An email address of an administrator in the other account.

5. You can modify the email subject, and the message text, as required.

6. Click **Save**. The Associated Account invitation will be sent via email and will wait for the other party to approve it.

Managing Outgoing Requests

In the **Associated Account** tab of the requesting user, a new **Outgoing Requests** section is displayed (see Figure 3), including details of any requests to connect with associated accounts pending approval.

You can recall or resend the message.

→ **To recall or resend a message:**

Perform one of the following:

- Click **Recall**.
  - The request is canceled and removed from both Outgoing and Incoming lists.
  - A message is sent to the contact address with the Subject: "Eligibility to access to the owner sites - cancelled". Message: "The owner has cancelled your eligibility to access their sites."
- Or Click **Resend**.
  - The original email message is resent to the contact address.

Figure 3: Recall or Resend Request

Managing Incoming Requests

In the **Associated Account** tab of the receiving user (Administrator), an **Incoming Requests** section is displayed (see Figure 3), including details of any incoming connection requests to connect with associated accounts pending approval.

> **NOTE**
>
> For multiple administrator accounts, the request will be shown to all, in addition to the one addressed by the email.

You can decline or approve the requests.

→ **To Approve or Decline a message:**

If you click **Approve**:

> **NOTE**
>
> Associated account users can provide access to their sites to the owner account

1 The request is approved and will be removed from both incoming and outgoing lists.

2 The associated account will show on the "Associated accounts" list of both parties

3 An email is sent to the associated account email address:

Subject: "<Shared account name> approved eligibility to access <owner account name> sites".
Message: "<Shared account name> has approved eligibility to access <owner account name> sites".

If you click **Decline**:

1 A warning message is displayed: "Are you sure you want to decline eligibility to access <Name> sites?"

2 The request is canceled and will be removed from both incoming and outgoing lists.

3 An email is sent to the shared account email address:

Subject: "<Shared account name> declined eligibility to <owner account name> sites".
Message: "<Shared account name> has declined eligibility to access <owner> sites".

> **NOTE**
>
> When approving an associated account, data is still not shared. This only activates the ability to grant system access.
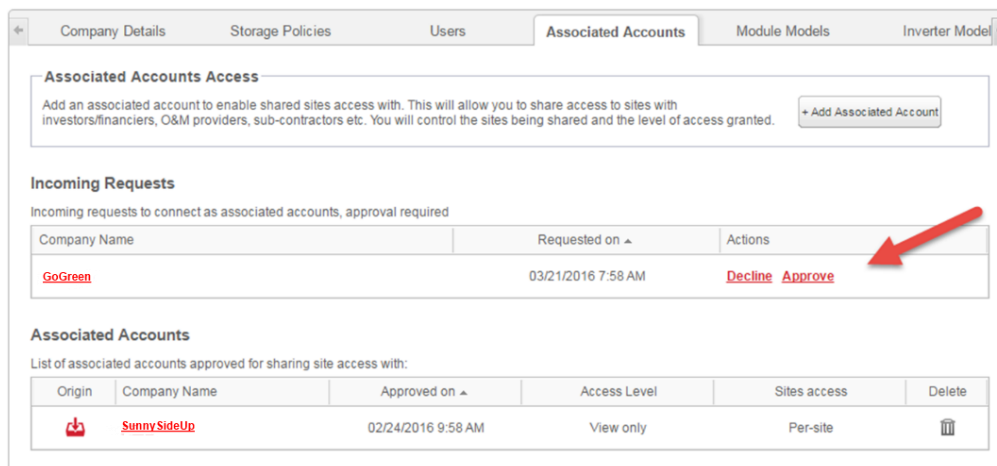
Figure 4: Incoming Requests

Managing Associated Accounts

With the request approved, the administrator can configure the appropriate sites access and level.

→ **To manage associated accounts:**

1. In the Associated Account section, click the Company Name **link**. The Associated Account Details window is displayed.

Figure 5: Associated Account Details

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

Access Control	Option	Description	Comments
Site access policy	All sites	Grant access to all sites (including sites to be created in future)	Selected access level will apply to all the sites (default is "view only"). This option requires acknowledgement of a short 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 associated accounts connection.
Access level limit	View only	Other party can only view the site(s) monitoring information.	
	View/Edit	Other party can view and edit site settings.	

3. Click **Save**. An email will be sent to notify the other party when site access is granted or revoked.

4. If you selected the Per-site policy, you can grant access with different control levels to different sites.

5. From the site list, select the site.

6. Click **Admin**.
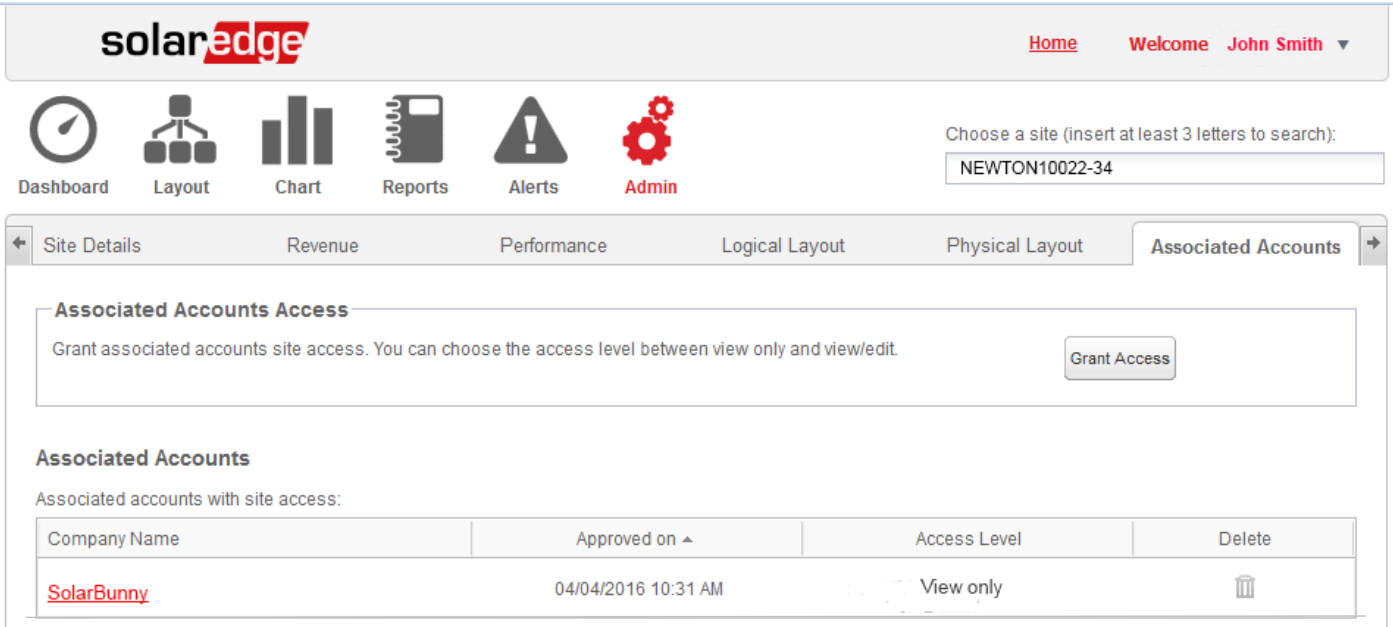
7. Select the **Associated Accounts** tab.

Figure 6:Granting Access Alert

8. In the *Associated Accounts Access* section, click **Grant Access**. The following screen is displayed.
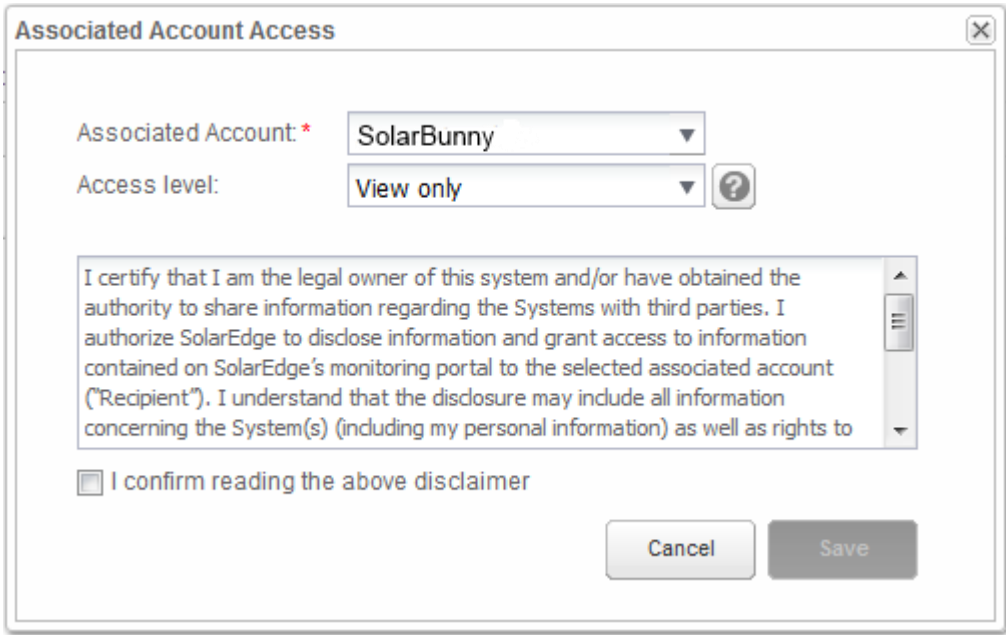

Figure 7:Grant Access Legal Disclaimer Error! Reference source not found.

9. Select the account to grant access to, and the access level (if applicable). Read the legal information and mark the confirmation check-box, below.

10. Click **Save**. An email is sent to the other party's account administration.