# Application Note - Creating and Managing a SolarEdge Account

## Version History

- Version 3.0 – May 2021: Updates in the UI
- Version 2.0 – Dec. 2018: Expanded to include creating an account for all SolarEdge online tools and platforms
- Version 1.0 – Jan. 2015: Initial version

## Introduction

This application note describes how installers can create a SolarEdge account for the Monitoring Platform, Designer, E-Learning platform and Support Center. The account is the highest level of the portal hierarchy. Every installer should createa new account upon first time registration. Once the account is created, every new site created by that user in the monitoring platform or Designer is associated with that account.

When opening an account for the monitoring platform, make sure you have a SolarEdge inverter serial number and the name of the distributor from whom it was purchased.

## Creating an Account

1. Access the SolarEdge login page at monitoring.solaredge.com, designer.solaredge.com or from the Login button at the top right corner of the SolarEdge website. A login page is displayed:



Monitoring platform login page

Designer, E-Learning platform and Support Center login page

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2. Click on **Click here** or **Sign up here** . A registration form is displayed:





3. Complete the Contact Details and Company Details forms.

4. If monitoring platform access is required, fill in the PV System Details section. Otherwise, uncheck the box **I request access to the Monitoring Platform**.

5. Read the SolarEdge Terms & Conditions and check the agreement checkbox.

6. Click **Confirm**.

After submitting the form you will receive an email with a link. By clicking the link you confirm your email address, and following a short validation process you will receive a second email. This email completes the opening of your account.

# Managing the Account

1. To access the account management page:

   a. From the monitoring platform, click your user name at the top right of the screen and select **My Account.**
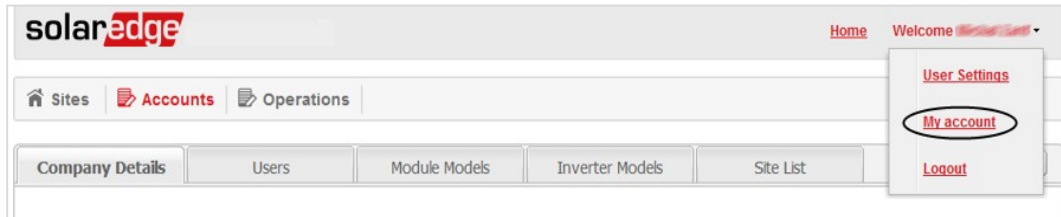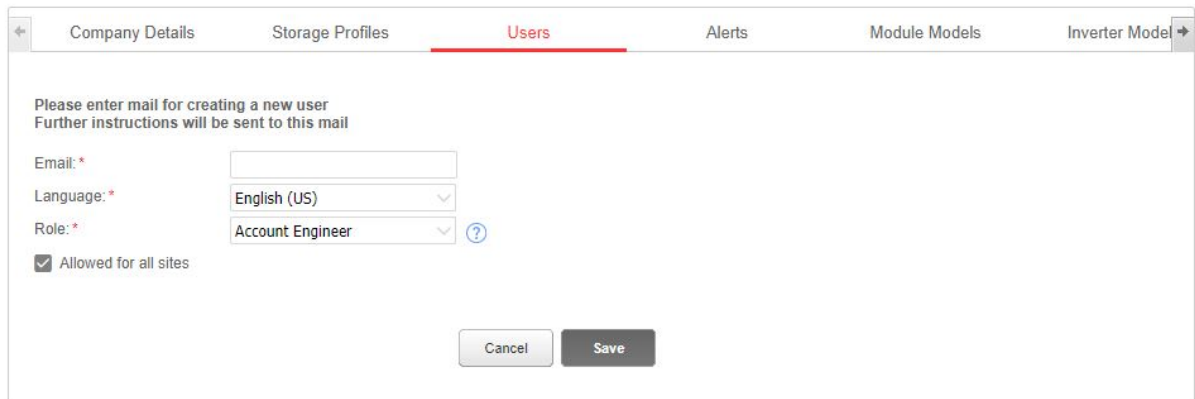


   b. From Designer, click the User Management icon at the bottom left of the page.
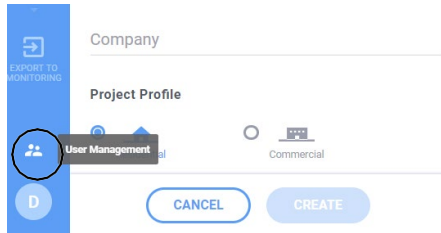


The account management window is displayed.

# Adding a New Account User

1. Select the **Users** tab in the account management window.
2. Click **+Add New User**. The following is displayed:



3. Fill in the new user's email address.
4. Select the language for the new user.

5. Select the role of the new user. The role defines to which monitoring platform screen(s) and tabs they will have access. Following are the allowed access levels of each role:

| User Role | Dashboard | Layout | Charts | Reports | Alerts | Admin |
|---|---|---|---|---|---|---|
| Account Manage r | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Account Watcher | ✓ | ✓ | ✓ | ✓ | ✓ | View only |
| Account Engineer | ✓ | ✓ | ✓ | ✓ | ✓ | |
| Account Sites Viewer | ✓ | ✓ | | | | |

6. To grant the access to all sites in the account, check the **Allowed for all sites** checkbox. If you do not check this checkbox, you can select the sites the user can access from a list after the user has been created. See Step 8.

7. Click **Save**. The user has been created.
   The user will receive an email with a short form to fill and once it is submitted, the new user will be added.

8. To select the site(s) which the new user can access, select the user in the **Users** tab. The following window is displayed:



9. To add sites: click **Add Site** and enter at least three consecutive characters from the site name. An auto-completed list of results is displayed; add or remove sites from the list and click **Save**.