

Enphase System Access Management – Propel Commissioning Steps

Contents

- 1 System Access Management.....2
- 2 Definitions 2
- 3 Creating a System 2
 - 3.1 Propel Prepaid Energy Services Agreement (ESA)2
 - 3.1.1 Commissioning Steps 2
- 4 User Roles and Access Levels under Each Company4
 - 4.1 Admin.....4
 - 4.2 User.....5
 - 4.3 View Only5
 - 4.4 Demo.....5
- 5 Revision history5

1 System Access Management

In the solar industry, systems can be sold, installed, and maintained through various business models, each involving different stakeholders and levels of ownership. These variations often create complexity in managing user access and establishing system records. This document outlines best practices for access control and site creation, providing clear guidance to ensure secure, efficient, and compliant operations across diverse scenarios—whether for initial commissioning, ongoing maintenance, or ownership transfers.

2 Definitions

Term	Definition
System Owner	Entity that legally owns the equipment (Homeowner for Cash/Loan; Leasing/PPA company for TPO).
System Host	The site occupant or homeowner where the system is installed (may differ from owner for TPO).
Installer/EPC	Company that designs, installs, and commissions the system.
Maintainer (O&M)	Company responsible for ongoing monitoring and service.
Authorized Subcontractor	Company pre-approved by an installer to perform site activations on their behalf.
Financing Partner	Company that provides the solar loan
Access Levels	Admin, User, View Only, and Demo roles inside each company in Enlighten.

3 Creating a System

3.1 Propel Prepaid Energy Services Agreement (ESA)

For this kind of system, the following represents the structured breakdown on the field.

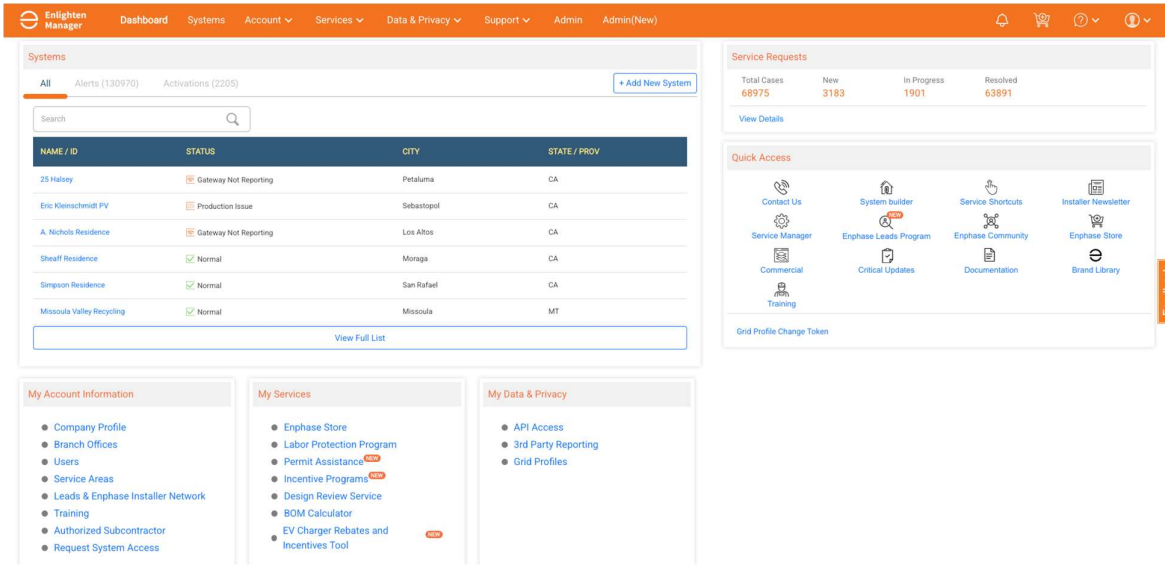
Prepaid Energy Services Agreement

- **The customer** pays a fixed monthly fee to use the system
- **Ownership:** The Leasing company owns the equipment until the buyout is exercised (default is 5 years unless the system host selects otherwise)
- **Entities involved:**
 - **TPO Company:** SolSource, owns and maintains the system
 - **Installer:** Installs the system, often contracted by SolSource for installation
 - **Originator:** TriBeam, works on behalf of SolSource to originate the financing product,
- **Access implications:** SolSource, installer, and maintainer need ongoing access for monitoring and service. The customer needs access for monitoring. TriBeam requires read-only access for monitoring.

The commissioning details are below:

3.1.1 Commissioning Steps

1. Installer logs in to the Enphase Installer Portal
2. Click on the 'Add New System'

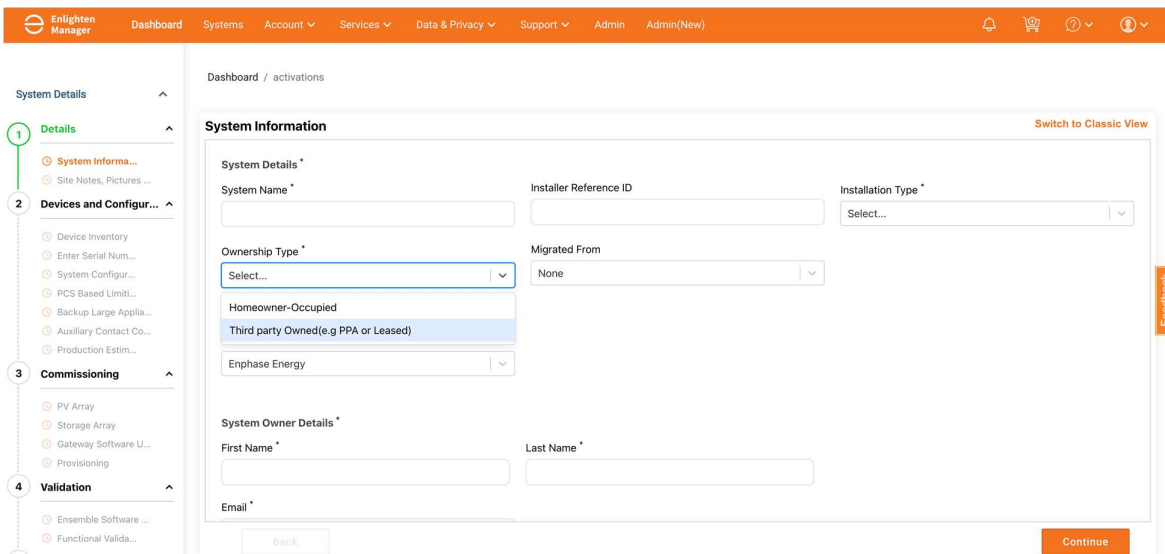


The screenshot shows the Enphase Manager Dashboard. The top navigation bar includes links for Dashboard, Systems, Account, Services, Data & Privacy, Support, Admin, and Admin(New). The main content area is divided into three sections:

- Systems:** A table listing systems with columns for NAME / ID, STATUS, CITY, and STATE / PROV. The table includes systems like 25 Haley, Eric Kleinschmidt PV, A. Nichols Residence, Sheaff Residence, Simpson Residence, and Missoula Valley Recycling. A search bar and a '+ Add New System' button are also present.
- Service Requests:** A summary table showing Total Cases (68975), New (3183), In Progress (1901), and Resolved (63891). A 'View Details' link is provided.
- Quick Access:** A grid of icons for various services including Contact Us, System builder, Service Shortcuts, Installer Newsletter, Service Manager, Enphase Leads Program, Enphase Community, Enphase Store, Commercial, Critical Updates, Documentation, and Brand Library.

Below the main sections, there are three sub-sections: My Account Information, My Services, and My Data & Privacy, each containing a list of links to various services and tools.

3. Choose Ownership Type as Third party Owned (e.g. PPA or Leased)



The screenshot shows the Enphase Manager System Information form. The form is titled 'System Information' and includes a 'Switch to Classic View' link. The form is divided into several sections:

- System Details:** Includes fields for System Name, Installer Reference ID, and Installation Type (a dropdown menu).
- Ownership Type:** A dropdown menu with options: Select..., Homeowner-Occupied, Third party Owned(e.g PPA or Leased), and Enphase Energy. The 'Third party Owned(e.g PPA or Leased)' option is highlighted.
- Migrated From:** A dropdown menu with the option: None.
- System Owner Details:** Includes fields for First Name, Last Name, and Email.

On the left side of the form, there is a sidebar with a list of steps: 1 Details, 2 Devices and Configur..., 3 Commissioning, and 4 Validation. The 'Details' step is currently selected.

4. Enter the SolSource email (support@gosolsource.com) in the System Owner details and the homeowner details in the System Host Details.

5. Scroll down and go the section to add another company to have access to the system, this is where TriBeam (switch-admin@beamfintech.com).

4 User Roles and Access Levels under Each Company

The matrix below summarizes capabilities by role.

Access Role	Create/Commission	Monitor/Service	Manage Users/Company
Admin	✓	✓	✓
User	✓	✓	✗
View Only	✗	View only	✗
Demo	✗	View demo-only	✗

4.1 Admin

- Users with this role can manage their own company and branch companies
- Users with this role can manage users within their own company and branch companies

- Users with this role can manage their company groups
- In an installer company, this user can access all Enlighten Manager functionality of an installer (activations, dashboard)

4.2 User

- Default role.
- In an installer company, this user can access all Enlighten Manager functionality of an installer (activations, dashboard), but cannot manage their company or users

4.3 View Only

- Similar to 'User' role, but users with this role can ONLY VIEW systems/activations that they can access

4.4 Demo

- Similar to the 'User' role, but with limited access to the systems they view
- Only sees systems that meet the criteria below
 - The system should be enabled for public view access by HOs
 - The system should be Normal state
 - The system should be reporting and in the Final stage
- Only sees the systems, and no activation link

5 Revision history

Revision	Date	Description