GivEnergy Single Sign-On (SSO)
Comprehensive Support Guide

VERSION: 2025 | For GivEnergy Installers & Technical Support Teams

Pre log-in wizard

1. Introduction to SSO

What is SSO & Why Is It Important?

Single Sign-On (SSO) is a **secure identity management system** that allows users to **access multiple GivEnergy platforms & accounts using a single set of credentials.** It improves security, simplifies login management, and ensures **installers, engineers, and customers can seamlessly switch between different accounts without needing multiple usernames and passwords.**

Key Benefits of SSO:

- **One Login for Everything** – Access **GivEnergy Portal, GivInstaller, and Customer Dashboard** with a single identity.
- **Enhanced Security –** Supports **Multi-Factor Authentication (MFA),** protecting accounts from unauthorized access.
- **Improved User Experience –** No more **forgotten passwords or account mix-ups**—everything is linked to a single identity.
- **Ensures Compliance & Accountability** – Helps GivEnergy track **which individual is responsible for an install,** improving **support response & training validation.**

2. Migration to SSO – Key Deadlines for Installers

Mandatory Migration Deadline: Tuesday, 4th March

- After this date, installer legacy logins will be permanently disabled, and installers must use SSO to access all GivEnergy systems.

Soft Deadline: 4th January 2025

- Installers strongly encouraged to migrate to SSO
- Installers can still use **legacy logins with limited bypass attempts (5 skips per account, 48 hours each)** before full SSO enforcement.

SSO Introduced: 20th December 2024

- SSO Identity functionality made available
- Installers strongly encouraged to migrate to SSO

Important Note: New installer accounts created after 20th December 2024 will automatically be set up with SSO – no action is required for these accounts.

Important Note: We will initially only be requiring installer accounts to migrate - so your customers will not be affected by this change. Distributors, business and customer accounts are not currently required to migrate (but can do so optionally). Future communications will be sent out regarding migration for other account types at a later date.

3. Step-by-Step Guide to SSO Migration

How to Migrate Your Account to SSO

Step 1: Start the Migration Process

- Log in to the GivEnergy Portal with your installer account and click the SSO migration banner OR go to Account Settings > Manage Account Security > Migrate to SSO.
- Note SSO onboarding is not available through the app.

From here click the Migrate button that appears and you will be prompted to create a new SSO Identity.

Step 2: Create your SSO identity

An SSO identity is a set of credentials associated with an individual (i.e. a specific person). This identity can have access to one or more GivEnergy accounts with different permissions. Manage Account Security > Migrate to SSO.

First we need to set up an SSO identity to which your GivEnergy accounts will be associated.

- First, enter your email address and create a secure password.
- If you previously used a username that wasn't an email, use your email address instead.

Note: Some legacy users may have previously logged in with a username and password that wasn't their email address. The new SSO service streamlines that sign in process by following standard practices – you must use a valid email address that you have access to for your SSO Identity.

You can use the exact same email and password as your Givenergy Portal account (providing the password meets the security requirements) but you must have access to the email account to receive verification codes.

Step 3: Verify your email

- A **verification code** will be sent to your registered email to ensure that you are the email account holder.
- Copy the code and enter it in the SSO portal.

The code will be sent from **noreply@givenergy.cloud** as seen above. Simply copy this code and paste it into the box as indicated in the image below.

Once the code is entered you will be prompted to login. Click "Go to login".

Step 4: Login to your new SSO Identity

- Click on the "Go to Login" button as per screenshot above
- Login using your new SSO Identity credentials (ensuring that you are using the new SSO credentials that you just set up).
- A **verification code** will be sent to your registered email to authenticate.
- Copy the code and enter it in the SSO portal, to log into your new SSO Identity
- From this point on you will need to login using your new **SSO credentials** on **both the GivEnergy app, Portal & GivInstaller** apps.

Optional - Step 5: Link your other existing GivEnergy accounts

If you only have one GivEnergy account, this step will not be required.

However, if you have multiple accounts (e.g. a customer and an installer account) you can link all these GivEnergy accounts to your new SSO Identity.

- When logged into the portal with your new SSO identity navigate to **Account Settings > Manage Account Security > Manage SSO**
- Click **"Add Another Portal Account"**
- Log in with your **old GivEnergy username and password** to connect your legacy account to your new SSO identity.

Now that you have linked your GivEnergy accounts to your new SSO identity you can access all your accounts via the same SSO login across app, portal and GivInstaller.

Once linking is complete your GivEnergy account will be associated with your new SSO account and appear assigned as shown below.

Step 6: Using SSO as your universal login

- Once you have linked all desired GivEnergy accounts to your new SSO Identity, you will see your accounts listed under **SSO Account Management.**
- You can now use the account switcher to access all linked accounts via your **SSO credentials** on **both the GivEnergy app, portal & GivInstaller.**

Issue? Check spam/junk folders for the verification email. If you don't receive a code, contact **support@givenergy.co.uk**
If using a web browser, please ensure you do not have multiple givenergy portal logins open in separate tabs otherwise this can fail when switching between websites.

4. Troubleshooting & FAQs

General Questions

1. What if I forget my SSO credentials?

Use the **'Forgot Password?'** option on the **SSO login page** to reset your password.

2. Can I still use my old login after migration?

No, once your account is migrated, you must use **SSO credentials** to log in.

3. I have multiple GivEnergy accounts, can I link them to one SSO identity?

Yes! Use the **SSO Account Management tool** to **link all your installer, business, and customer accounts under one**

4. What if I use shared accounts with my team?

Each engineer/installer **must have their own SSO identity** for accountability. Shared logins **will no longer be supported** after migration. Your business account owner can create new installer accounts & arrange appropriate training to resolve this issue.

Legacy Login & Bypass Issues

5. How do I use the bypass if I haven't migrated yet?

- Go to the **legacy login page,** enter credentials, and click **"Bypass Migration".**
- This allows access for **48 hours** per bypass.
- After **5 bypass attempts,** migration becomes mandatory.
- Bypass functionality will not be available after 4th March 2025

6. I migrated my account, but my old login still works—why?

- Until **4th March of 2025,** both legacy and SSO logins will work **temporarily,** but **installer legacy logins will be removed permanently** after this date.

Portal & App Login Issues

8. I can't log into the portal after migration.

- Ensure you are using the **"SSO Login"** button, NOT the old login form.
- Check that you **entered your SSO credentials (not an old username).**
- If you are using a password manager – ensure that it is updated to use your new SSO credentials.

9. I migrated my account, but the app isn't recognizing my login.

- Make sure you are using **SSO credentials,** not legacy ones.
- If the issue persists, log out and log back in using **'SSO Login'** on the app.
- If you are using a password manager – ensure that it is updated to use your new SSO credentials

SSO Migration Info Screens

During the migration window, depending on your migration status, you may see one or more of the screens below as you attempt to login. The following sections give more info on what to do if you encounter these screens and need help.

Migration Deadline Screen

- Unmigrated accounts will see this screen when using the legacy login method after the 4th January 2025. You can choose to bypass this screen up to 5 times, but after this you must migrate your account using the 'setup now' button to access the Portal.

Legacy Login Screen:

- This page indicates that an SSO migrated account has been logged into using the legacy method / credentials.
- The 'Sign in with SSO' button will navigate you to the SSO login screen to allow you to access the portal with your new SSO credentials.
- If you don't recall migrating the account to SSO, it's worth ensuring that nobody else has access to your account. If this is the case, you will need to ensure that all users who were previously sharing your Portal account have their own Portal account set up, linked to their own SSO Identity.
- If your account has been linked to another user's SSO Identity and this requires changing, Customer Support will be able to de-link the accounts.
- Before the 4th March you can skip this page up to 5 times (but will not have access to your SSO functionality whilst logged in this way). After the 4th March you will not be able to access using the legacy credentials.

SSO Login – No Portal Account:

- In some rare cases, an SSO Identity can be created without connecting a Portal Account, (for example when the
- If you log in with SSO and see this screen, your Portal account is either connected to a different SSO Account, or didn't properly connect to the SSO account you're trying to log into.
- To resolve this, attempt to log in to your portal account using your legacy credentials. If you login without seeing this screen, re-try migration, signing in to your SSO account rather than registering a new one, this will link the portal account to the correct SSO Identity.
- Otherwise, please contact GivEnergy Customer Support who will be able to resolve your issue.

5. Future Benefits of SSO for Installers

In the future, we plan to add additional features that build upon our SSO Identity. For example:

- **Even Stronger Security** – Further reducing risk of unauthorized account/system access.Registration flow is interrupted unexpectedly).
- **Faster Commissioning** – No need to juggle multiple logins for different systems, faster access to planned commissions.
- **Better Support & Training Access** – SSO establishes a clearer link between the installer and a commission, enabling GivEnergy support to view site data, provide faster, more targeted assistance & ensuring installers have access to the right training resources for their specific job.
- **Seamless Multi-Account Management** – Switch between **installer, business, and customer accounts** without logging out.
- **Other Future Features** – SSO will allow us to enable biometric **logins, social login options, and advanced MFA security** in future updates.

6. Final Notes & Support Contacts

Mandatory Deadline: Tuesday, 4th March (No legacy logins will be possible after this date – if you have not migrated to SSO by this date, you will be blocked).

Need Help? **Contact: support@givenergy.co.uk**