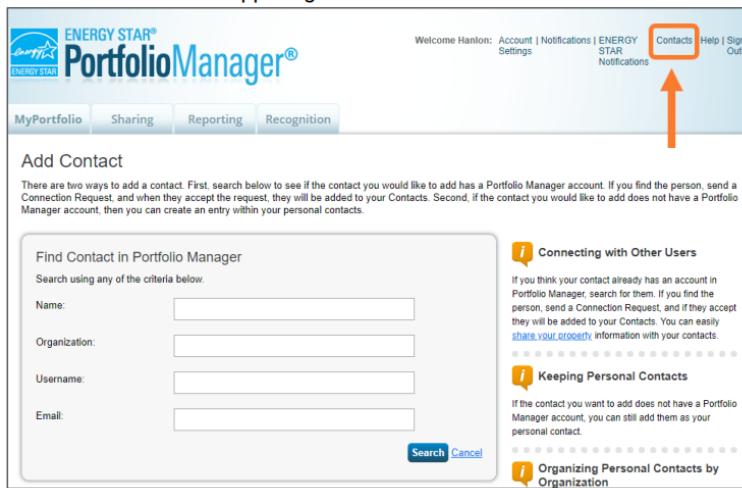


Guide 2: Adding EnergyCAP as a contact within Energy Star PortfolioManager

In order for ECAP to correctly connect to ESPM you must have EnergyCap as a contact within ESPM. Customers migrated from My Data or My Data Manager may not have EnergyCap added as a contact. This is a bug from the migration. These steps will ensure that you have ECAP added as a contact within ESPM. Start by logging into your Portfolio Manager account.

Step 1: Select contacts in the upper right-hand corner of PM.



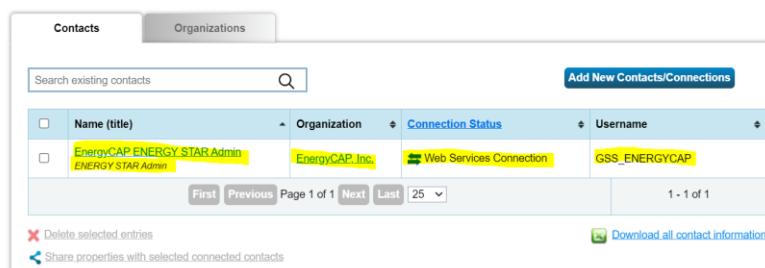
The screenshot shows the ENERGY STAR PortfolioManager interface. At the top, there is a navigation bar with links for 'Welcome Hanlon', 'Account', 'Notifications', 'ENERGY STAR Notifications', 'Contacts' (which is highlighted with an orange box and has an orange arrow pointing to it), 'Help', and 'Sign Out'. Below the navigation bar, there are tabs for 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. The main content area is titled 'Add Contact'. It contains a search form with fields for 'Name', 'Organization', 'Username', and 'Email', and buttons for 'Search' and 'Cancel'. To the right of the search form are three informational sections: 'Connecting with Other Users', 'Keeping Personal Contacts', and 'Organizing Personal Contacts by Organization'. The 'Connecting with Other Users' section is expanded, showing text about connecting with users who already have an account.

If you have EnergyCAP added as a contact within ESPM you will see it added as a contact and can skip the rest of the steps for this section.

Example of ECAP already added as a contact:

My Contacts and Organizations

This is where you keep track of your contacts and/or organizations (i.e. people or companies associated with your properties such as Professional Engineers, Registered Architects, or others with whom you share information). You can add anyone as a contact, regardless of whether they have a Portfolio Manager account and you can share your properties & reports with any of your **connected** contacts. You can "connect" to other Portfolio Manager users by searching for their accounts and sending a connection request.

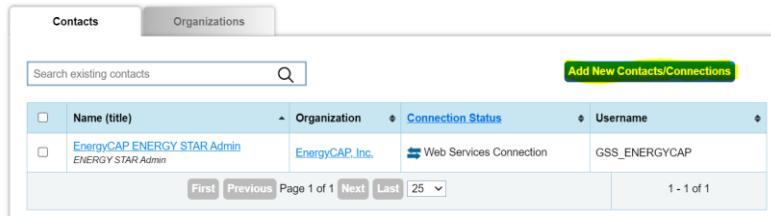


The screenshot shows the 'My Contacts and Organizations' page. At the top, there are tabs for 'Contacts' (which is selected and highlighted with a blue box) and 'Organizations'. Below the tabs is a search bar with the placeholder 'Search existing contacts' and a magnifying glass icon. To the right of the search bar is a button labeled 'Add New Contacts/Connections'. The main content area is a table showing a list of contacts. The first contact listed is 'EnergyCAP ENERGY STAR Admin' (with 'ENERGY STAR Admin' also highlighted with a yellow box). The table columns are 'Name (title)', 'Organization', 'Connection Status', and 'Username'. The 'Organization' column shows 'EnergyCAP, Inc.', the 'Connection Status' column shows 'Web Services Connection', and the 'Username' column shows 'GSS_ENERGYCAP'. At the bottom of the table, there are buttons for 'First', 'Previous', 'Page 1 of 1', 'Next', 'Last', and a dropdown for '25'. To the right of the table, there are links for 'Delete selected entries' and 'Download all contact information'. Below the table, there is a link for 'Share properties with selected connected contacts'.

Step 2: If you don't see ECAP added as a contact, click the Add New Contacts button.

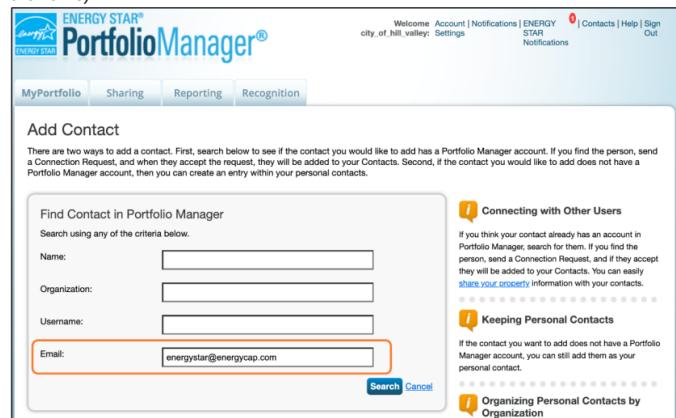
My Contacts and Organizations

This is where you keep track of your contacts and/or organizations (i.e. people or companies associated with your properties such as Professional Engineers, Registered Architects, or others with whom you share information). You can add anyone as a contact, regardless of whether they have a Portfolio Manager account and you can share your properties & reports with any of your **connected** contacts. You can "connect" to other Portfolio Manager users by searching for their accounts and sending a connection request.



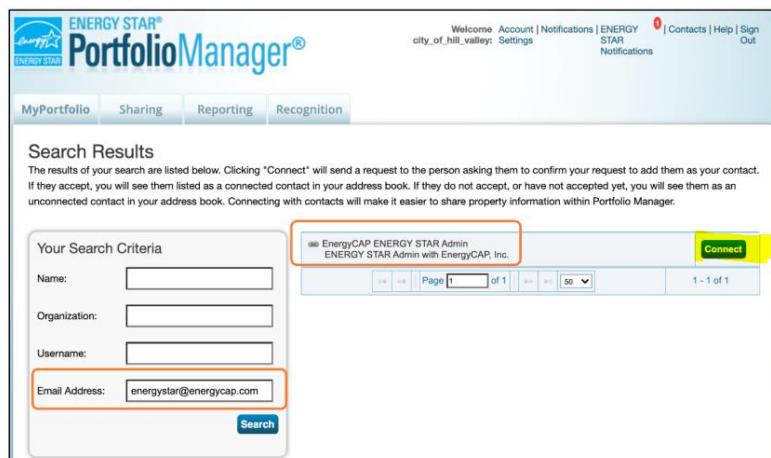
The screenshot shows a table with a single row of data. The columns are: Name (title), Organization, Connection Status, and Username. The data in the row is: EnergyCAP ENERGY STAR Admin, EnergyCAP, Inc., Web Services Connection, and GSS_ENERGYCAP. There are buttons for 'First', 'Previous', 'Page 1 of 1', 'Next', 'Last', and a dropdown for '25'. A 'Search existing contacts' input field and a 'Q' search icon are at the top left. A 'Add New Contacts/Connections' button is at the top right.

Step 3: Search for the email address energystar@energycap.com. This is the ONLY account that should be used (please ignore any other accounts that may include EnergyCAP in the name).



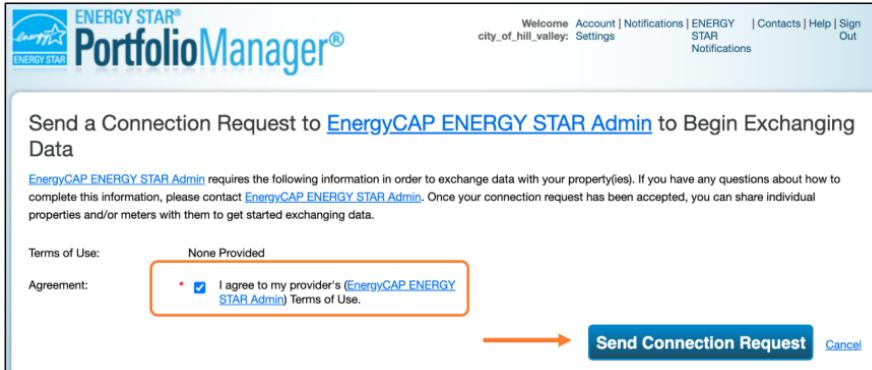
The screenshot shows the 'Add Contact' page. In the 'Email:' field, the value 'energystar@energycap.com' is highlighted with an orange box. To the right of the search form, there are three informational callouts: 'Connecting with Other Users', 'Keeping Personal Contacts', and 'Organizing Personal Contacts by Organization'. Below the search form, there are buttons for 'Search' and 'Cancel'.

Step 4: The proper EnergyCAP account is named EnergyCAP ENERGY STAR Admin. Click the Connect button next to this account.



The screenshot shows the 'Search Results' page. In the 'Email Address:' field, the value 'energystar@energycap.com' is highlighted with an orange box. To the right of the search form, there is a 'Connect' button, which is highlighted with a yellow box. Below the search form, there are buttons for 'Search' and 'Cancel'.

Step 5: Read and agree to the connection terms. Select I agree to my provider's (EnergyCAP ENERGY STAR Admin) Terms of Use and click the Send Connection Request button.



Step 6: After making your connection request, return to EnergyCAP to finish the setup process. Make sure your ESPM user id aligns to the ECAP ESPM user id (refer to Guide 1).