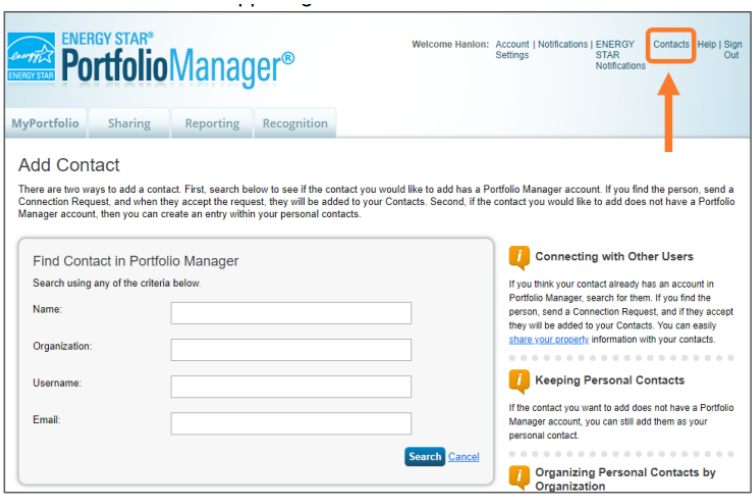
Guide 2: Adding EnergyCAP as a contact within Energy Star PortfolioManager

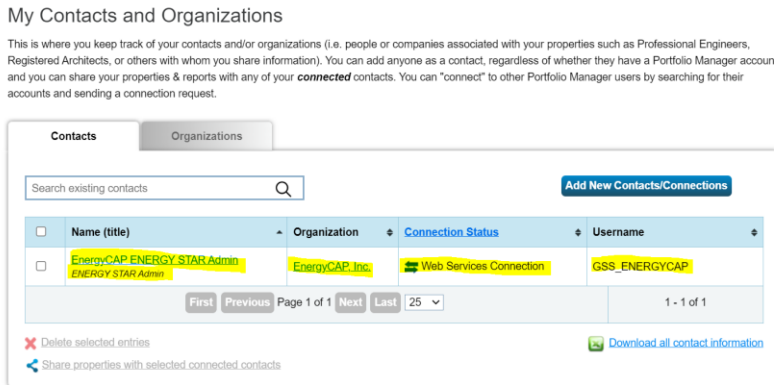
In order for ECAP to correctly connect to ESPM you must have EnergyCap as a contact within ESPM. Customers migrated from My Data or My Data Manager may not have EnergyCap added as a contact. This is a bug from the migration. These steps will ensure that you have ECAP added as a contact within ESPM. Start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

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

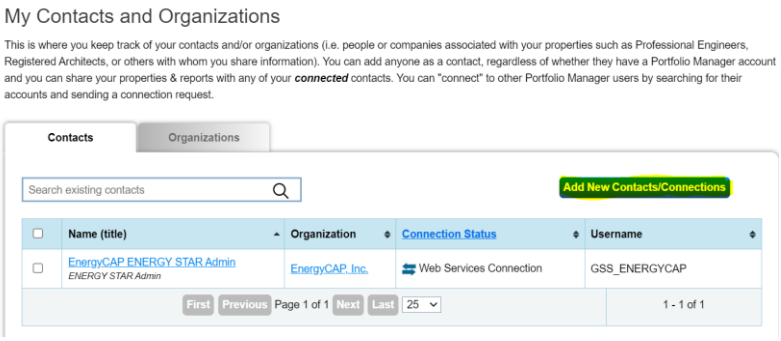


If you have EnergyCAP added as a contact within ESPM you will see it added as a contact and can skip the rest of the steps for this section.

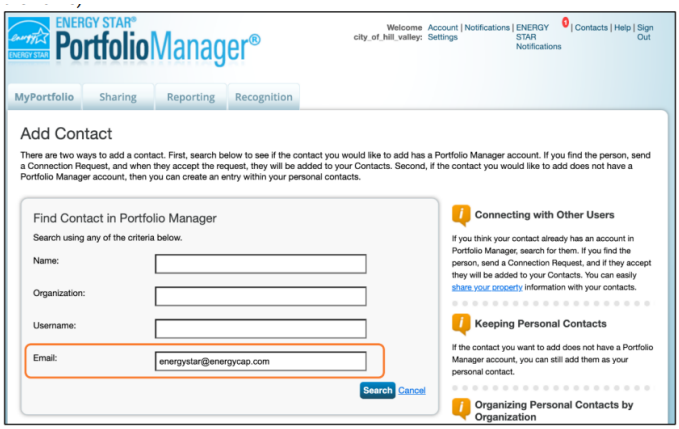
Example of ECAP already added as a contact:



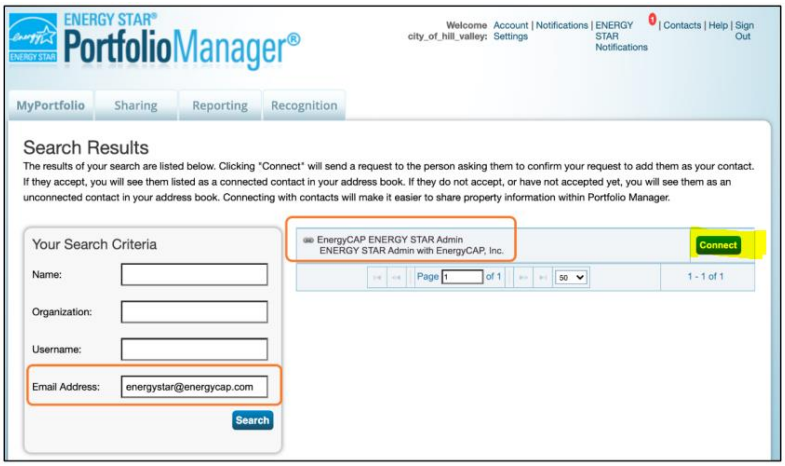
Step 2: If you don't see ECAP added as a contact, click the Add New Contacts button.



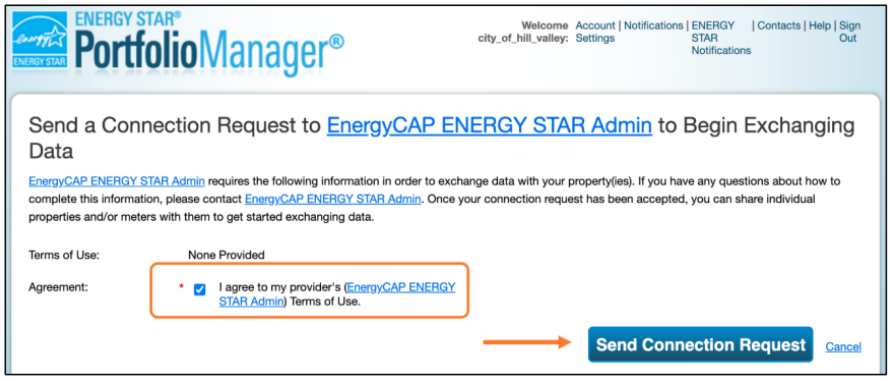
Step 3: Search for the email address energystar@energycap.com. This is the ONLY account that should be used (please ignore any other accounts that may include EnergyCAP in the name).



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



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).