

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.

ENERGY STAR® PortfolioManager®

Welcome Hanton: Account Settings | ENERGY STAR Notifications | **Contacts** | Help | Sign Out

MyPortfolio | Sharing | Reporting | Recognition

Add Contact

There are two ways to add a contact. First, search below to see if the contact you would like to add has a Portfolio Manager account. If you find the person, send a Connection Request, and when they accept the request, they will be added to your Contacts. Second, if the contact you would like to add does not have a Portfolio Manager account, then you can create an entry within your personal contacts.

Find Contact in Portfolio Manager

Search using any of the criteria below:

Name:

Organization:

Username:

Email:

[Search](#) [Cancel](#)

Connecting with Other Users

If you think your contact already has an account in Portfolio Manager, search for them. If you find the person, send a Connection Request, and if they accept they will be added to your Contacts. You can easily [share your property](#) information with your contacts.

Keeping Personal Contacts

If the contact you want to add does not have a Portfolio Manager account, you can still add them as your personal contact.

Organizing Personal Contacts by Organization

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.

Contacts				
Search existing contacts <input type="text"/>				
Add New Contacts/Connections				
<input type="checkbox"/>	Name (title)	Organization	Connection Status	Username
<input type="checkbox"/>	EnergyCAP ENERGY STAR Admin	EnergyCAP, Inc.	Web Services Connection	GSS_ENERGYCAP
First Previous Page 1 of 1 Next Last 25 1 - 1 of 1				
Delete selected entries Download all contact information				
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.

Contacts		Organizations	
Search existing contacts		Add New Contacts/Connections	
<input type="checkbox"/>	Name (title)	Organization	Connection Status
<input type="checkbox"/>	EnergyCAP ENERGY STAR Admin ENERGY STAR Admin	EnergyCAP, Inc.	Web Services Connection
			GSS_ENERGYCAP
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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).

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Welcome Account | Notifications | ENERGY STAR | Contacts | Help | Sign Out

city_of_hill_valley: Settings Notifications

MyPortfolio Sharing Reporting Recognition

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Find Contact in Portfolio Manager

Search using any of the criteria below.

Name:

Organization:

Username:

Email:

Search Cancel

Connecting with Other Users

If you think your contact already has an account in Portfolio Manager, search for them. If you find the person, send a Connection Request, and if they accept they will be added to your Contacts. You can easily share your property information with your contacts.

Keeping Personal Contacts

If the contact you want to add does not have a Portfolio Manager account, you can still add them as your personal contact.

Organizing Personal Contacts by Organization

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

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Welcome Account | Notifications | ENERGY STAR | Contacts | Help | Sign Out

city_of_hill_valley: Settings Notifications

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Search Results

The results of your search are listed below. Clicking "Connect" will send a request to the person asking them to confirm your request to add them as your contact. If they accept, you will see them listed as a connected contact in your address book. If they do not accept, or have not accepted yet, you will see them as an unconnected contact in your address book. Connecting with contacts will make it easier to share property information within Portfolio Manager.

Your Search Criteria

Name:

Organization:

Username:

Email Address:

Search

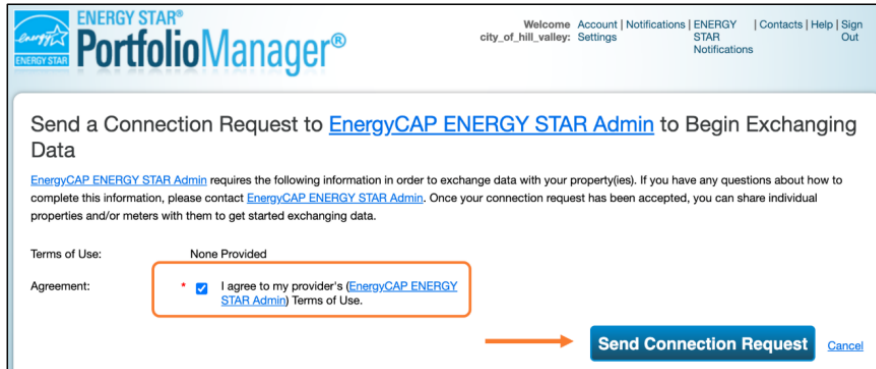
EnergyCAP ENERGY STAR Admin
ENERGY STAR Admin with EnergyCAP, Inc.

Connect

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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.



The screenshot shows the 'EnergyCAP ENERGY STAR Portfolio Manager' interface. At the top, there is a navigation bar with links: Welcome, Account, Notifications, ENERGY STAR, Contacts, Help, Sign Out. Below the navigation bar, the main heading reads 'Send a Connection Request to [EnergyCAP ENERGY STAR Admin](#) to Begin Exchanging Data'. A paragraph of text explains that EnergyCAP ENERGY STAR Admin requires information to exchange data and provides instructions on how to complete this information. Below this, there is a section for 'Terms of Use' with the text 'None Provided'. Underneath, there is an 'Agreement' section with a red asterisk and a checked checkbox next to the text 'I agree to my provider's [EnergyCAP ENERGY STAR Admin](#) Terms of Use.' An orange arrow points from this checkbox to a blue button labeled 'Send Connection Request' and a smaller blue link labeled 'Cancel'.

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).