

Purpose	By the end of this job aid you will be able to link an account and building in EnergyCAP to an account and building in ENERGY STAR <sup>®</sup> Portfolio Manager <sup>®</sup> .
Audience	EnergyCAP customers and PSE users.

		Link an EnergyCAP account to an ENERGYSTAR <sup>®</sup> Portfolio Manager <sup>®</sup> account
Image: Constraint of the state of	1 2 3	Select a building in EnergyCAP. Click the building's <b>ENERGY STAR</b> tab. Click the <b>Get Started</b> button.
ENERGY STAR Settings       Cancel         Before you can submit data to Portfolio Manager you must first invite EnergyCAP to share data with your Portfolio Manager account by following these steps:       1. Create a Portfolio Manager account [2] (if you don't have one).         1. Create properties in Portfolio Manager.       3. Send monnection request to EnergyCAP ENERGY STAR Admin from 4 rolio Manager.         Start Connection Request       I already sent a connection request         1. Connect > 2. Verify Connection > 3. Settings       ?	4	Click the Start Connection Request button. (Note: If you do not yet have an ENERGY STAR® Portfolio Manager® account, follow the steps shown to Create a Portfolio Manager Account. Or see 2a_JobAid_EnergySTAR- AddProperty to add a property in Energy Star.)



	5	Enter your username and password.
<page-header></page-header>	6	Click the <b>Send Connection Request</b> button.
ENERGY STAR Settings Cancel Verify   Provide your Portfolio Manager username so we can verify and acce or your connection request. 8   Portfolio Manager username ?	7 8	In EnergyCAP, enter your ENERGY STAR <sup>®</sup> Portfolio Manager <sup>®</sup> username. Click <b>Verify</b> .



ENERGY STAR Settings       Cancel       Save            We found your connection request. Set your earliest submission meand click Save to complete your ENERGY STAR configuration.       10         Portfolio Manager username       10         Your username       9         Earliest submission month       2022         January       2022	9 10	Select the Earliest submission month and year for which you would like EnergyCAP to submit data. Click <b>Save</b> .
		Link an EnergyCAP building to an ENERGY STAR <sup>®</sup> Portfolio Manager <sup>®</sup> building
Celendated Data       Berry DE PROPERTINE         Properties       DATA         Def Solution       Share your properties in Portfolio Manager         Defore you can submit data to ENERGY STAR you need to have your Portfolio Manager properties using the following estings:         Def Services Provider         Def Properties         Dial Properties         Defore Burg CAP         Defore You can submit data to ENERGY STAR you need to have your Portfolio Manager properties using the following estings:         Defore You Can submit data to ENERGY STAR you need to have your Portfolio Manager properties using the following estings:         Defore You Can submit data to ENERGY STAR you need to have your Portfolio Manager properties using the following estings:         Defore You Can submit data to ENERGY STAR you need to have you portfolio Manager properties using the following estings:         Defore You Can submit data to ENERGY STAR you need to have you portfolio Manager properties using the following estings:         Defore You Can submit data to ENERGY STAR you need to have you portfolio Manager properties using the following estings:         Defore You Can submit data to ENERGY STAR you need to have you portfolio Manager properties         Defore You Can submit data to ENERGY STAR you need to have you portfolio Manager you portfolio Man	1	Click the Share Properties button.
We come matankief: Account   Notification () ENERGY Matching of Contacts   Help   Sign Stram () Stram () Contacts   Help   Sign () Contacts   H	2	On the Share Properties for Exchanging Data page, select EnergyCAP ENERGY STAR Admin from the Web Services Provider drop-down menu.



2	Select Properties Which Properties do you want to share? Note that while you can share properties that include unsupported meter types, those specific meters will not be shared. Select Properties 3					Click Select Properties.
Select Pr	roperties			0	4	Select all properties.
Search Constraints Search Constraints Search Constraints Search Constraints Selected Pro	me	Property Type     •       Retail Store     •       Restaurant     •       Fast Food     •       Restaurant     •       Pre-school/Daycare     •       Personal Services     •       Restaurant     •       Personal Services     •       Personal Services     •       Other - Recreation     •       Retail Store     •	Statu/Provinceo     Filte       WA     P       WA     P	er Properties (9) r by Property Type saf Food Restaurant (1) ther - Recreation (1) ersonal Services (Health/Beauty, Dry r by Construction Status etaing (3) r by State/Province astington (9) r by Shared from one - My Properties (PDA) (9)	5	Click <b>Apply Selection</b> .
3 e	Selected Fromentes 1  Choose Permission  Any only need to choose one permission (because you are giving the same permission building takes), you can choose that permission how. Otherwise, you may assign that you takes), you can choose that permission how. Otherwise, you may assign any other permissions for different properties and and score.					Select Bulk Sharing, Exchange Data Full Access. Click <b>Authorize Exchange</b> .



Your Organization > 開 North Buildings [NORTH_BUILDINGS_]				Click the Link buildings button.
Calendarized Data Normalized Data Savings ENERGY STAR Properties				
You have 9 properties in Portfolio Manager that are not linked to any buildings in EnergyCAP. Link Buildings				
This organization to submit to ENER Link a building to a pr submit usage data an energy use and bench Link Buildings Learn 8	has no buildings configured RGY STAR operty in Portfolio Manager to d receive scores on your building's imark performance.	<b>Energy</b> LEARN MORE AT energystar.gov		
Your Organization > 🔛 North Buildings (NORTH_BUILDINGS_] Calendarted Data Normalized Data Servings (PRERCYSTAR Prosonies		Actions	9	Locate the building you are linking in the list and click <b>Link Building</b> .
Search buildings	Uninked Buildings	100,000		
Building	Area			
Building 1	0 H <sup>a</sup>	Link Building		
Building 2	0 ft4	Link Building		
Building 3	a fr	Link Building		
Building 5	afr	Link Building		
Building 6	0.02	Link Building		
Building 7	0 H2	Link Building		
Building 8	0 ft=	Link Building		
Building 9	0.114	Link Buildings		
Building ENERGY STAR Configuration		Cancel Save	10	Select the property in the Portfolio
Building		Portfolio Manager Property is required	IV	Manager drop down list on the right.
PSE Headquarters [PSE_HEADQUARTERS]		Choose 11		5 1 5
Meters to Submit to ENERGY STAR	Use/Day Cost/Day	20800858		
PSE Headquarters - ELE01	1,952.90 kWh \$203.14	PSE Headquarters 18664712	11	Click Save.