Appendix B
Entering Utility Data Manually into Portfolio Manager

If you only have a few meters serving your building and prefer to hand enter the data, this option may work. We don't recommend it for multifamily or commercial with many tenants, as you will need get permission from all tenants to collect their bills.

☐ Log in to your **Portfolio Manager** account and click on your property.
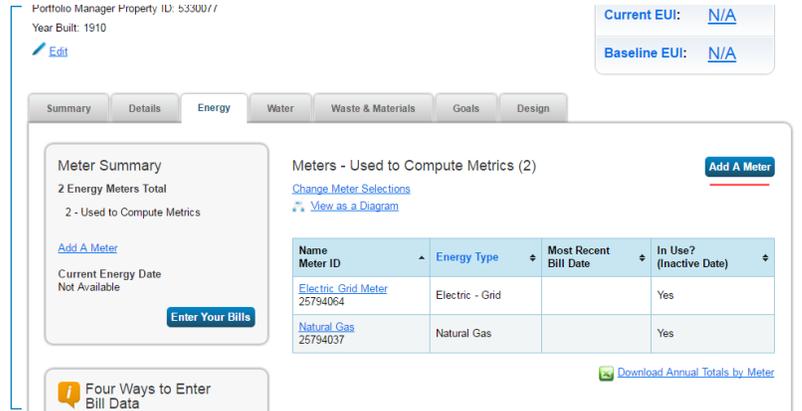
1. Add Energy Meters

☐ In your Property Profile page, click on the **Energy** tab and select **Add A Meter**.

☐ Select the **types of fuel** in your facility. For each type, enter the number of meters for that type. Click **Get Started**.

☐ On the **About Your Meters** section, click in the table to enter meter details.

About Your Meters for Ocean Vista Offices

Enter the information below about your new meters. The meter's **Units** and **Date Meter became Active** are required. You can also change the meter's name.

1 Energy Meter for Ocean Vista Offices (click table to edit)

	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Enter as Delivery?
☐	Natural Gas	Natural Gas		therms		✔		☐

✖ Delete Selected Entries
➕ Add Another Entry

☐ Select the **correct unit** for the fuel type:
  1. Seattle City Light Electric = kWh
  2. Puget Sound Energy Natural Gas = Therms
  3. Seattle Steam = kLbs

☐ **Enter the Date Meter Became Active**. This is the date that the first bill was issued for the meter. (Note: if you are unsure of the first bill date, use your best guess).

☐ Select **In Use** if the meter is currently in use.
  ☐ Leave the **Date Meter Became Inactive** empty since meter is currently in use.
  ☐ Only select **Enter as Delivery** if the energy source is delivered to you, such as fuel oil or propane from a truck, as opposed to metered usage.

☐ If you need to add another **meter**, select **Add Another Entry**.

☐ When done entering meters, click **Continue**.

▼ Electric Grid Meter Edit

	Start Date	End Date	Usage	Cost	Estimation	Green Power
☐	1/1/2012	2/1/2012	2500 kWh (thousand Watt-hours)	250	☐	☐
☐	02/02/2012	03/01/2012	3000 kWh (thousand Watt-hours)	$ 300	☐	☐

✖ Delete Selected Entries
➕ Add Another Entry

❗ You can upload an excel spreadsheet with your basic bill information using our spreadsheet template.

Choose File No file chosen   Upload

2. Enter Energy Usage

☐ On the next page, click in the table to **enter the bill dates and usage** for each month (cost is optional). Click **Add Another Entry** to add more months.

☐ Once you have entered at least 12 consecutive months of data for the year required, click **Finish Meter Set Up**.

☐ On the next page, select the meter(s) to be included in the energy metrics.

☐ Then select "These meter(s) account for the total energy consumption for this property" and click **Apply Selections**.

☐ You will be taken back to the **Property Profile** page.

☐ **Continue with Steps 4-6** to finish benchmarking and report to the City of Seattle.