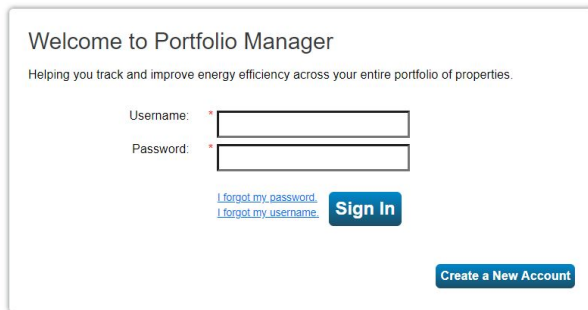


Energy Star Portfolio Manager Connect Instructions

LOGIN TO YOUR EXISTING PORTFOLIO MANAGER ACCOUNT

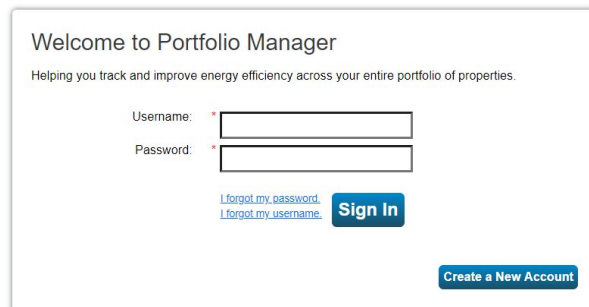
- A. Go to the [Energy Star Portfolio Manager Website](#)



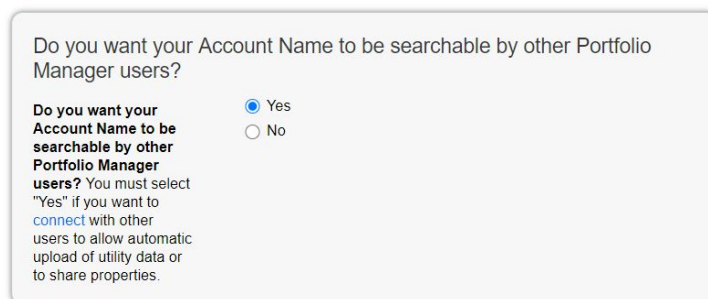
OR

CREATE A NEW ACCOUNT

- A. Go to the [Energy Star Portfolio Manager Website](#)



- B. Click the Create a New Account button
 C. Input your information into all fields
 D. Click YES when it asks "Do you want your Account Name to be searchable by other Portfolio Manager users?"



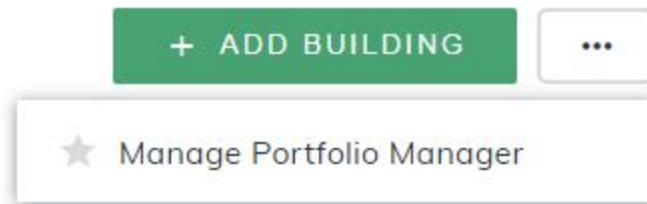
STEPS TO CONNECT YOUR ACCOUNT WITH BUILDDEE

By Connecting your Portfolio Manager account with builddee, you will be able to easily exchange data between the two platforms after you've shared your Property and Meter data within the Portfolio Manager system.

1. Sign into your [Energy Star Portfolio Manager](#) (ESPM) account.
2. Click on "Contacts" in the header.
3. Search for "builddee" in the search for contacts field in the top-right, you should see:

The screenshot shows the 'Search Results' page in the Energy Star Portfolio Manager interface. The search criteria are 'Name: builddee' and 'Organization:'. The results list 'builddee Platform' with the description 'Property Sharing Bot with simuwatt, Inc.' and a 'Connect' button. The page also includes a 'Your Search Criteria' section and a pagination bar showing 'Page 1 of 1'.

4. Click "Connect" next to builddee Platform, Property Sharing Bot with simuwatt, Inc.
5. Agree to the terms and confirm the connection request.
6. Sign into [builddee](#), select the more options button (...), and select Manage Portfolio Manager.

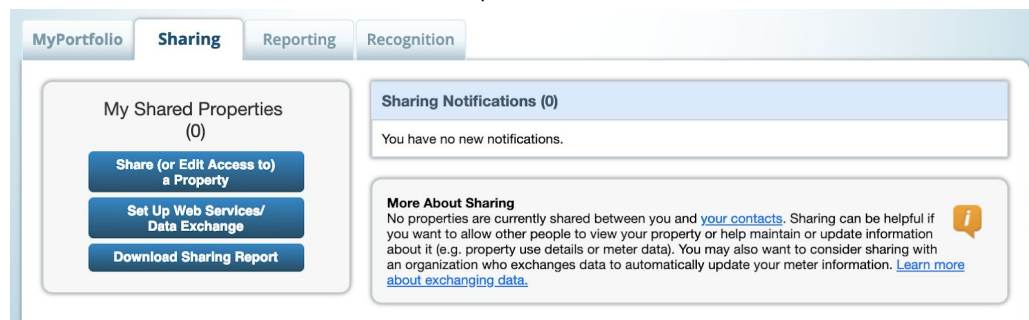


7. Enter in the username and the account email associated with the ESPM account you have just shared (ESPM only releases certain identifiable data in a sharing request and this data is necessary to confirm your identity).

The screenshot shows the 'Accounts' page in the Energy Star Portfolio Manager interface. It includes a '+ CONNECT NEW ACCOUNT' button and a form with fields for 'PM Email' and 'PM Username'. The page also contains a 'CANCEL' button and a 'CONNECT' button. The text on the page explains the process of connecting the Portfolio Manager account with Builddee.

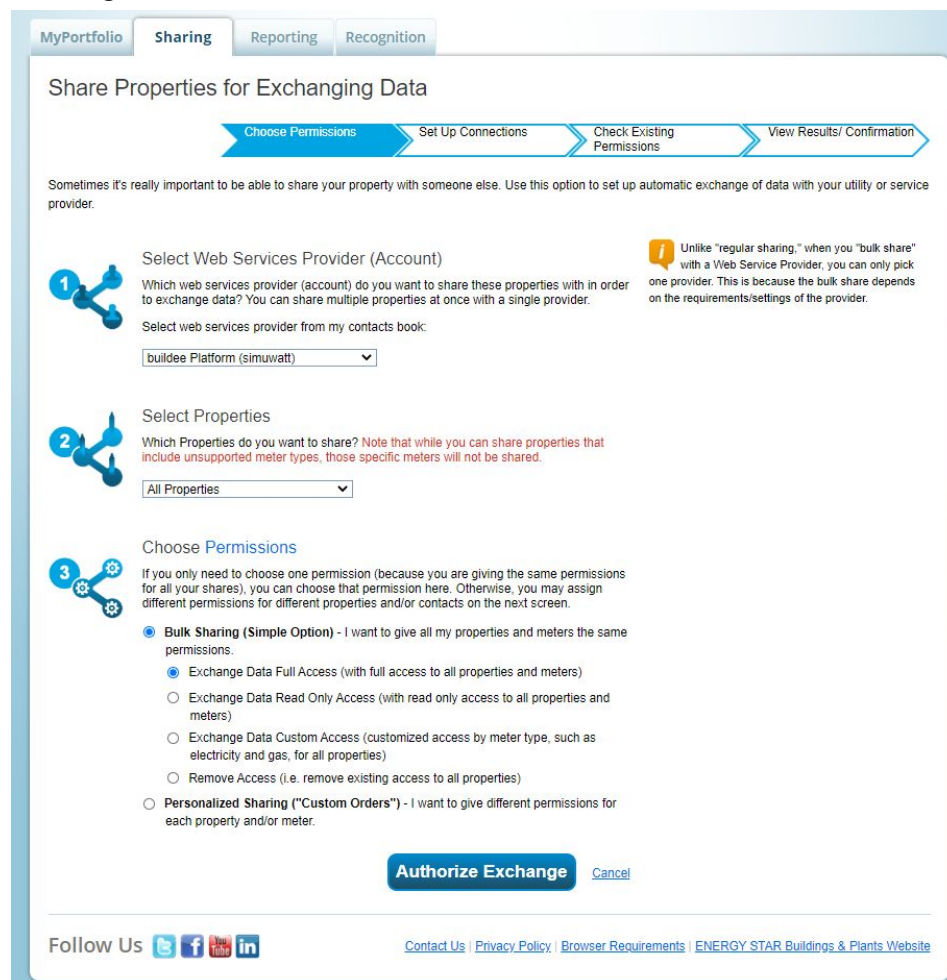
8. Now, to access properties and meters through builddee, you must share these as well, sign back into Portfolio Manager.

9. Click on the sharing tab and select Set Up Web Services/Data Exchange



10. Choose buildee Platform (simuwatt) from your contacts to share with, select All Properties, and set permission levels. As a reminder you can only specify a permission level equivalent to the level with which you were granted access. Therefore, if you were given "Read Only" access you can only grant "Read Only" access to buildee. If you were given "Full Access" permission you can grant either "Full Access" or "Read Only" access.

- a. For properties wishing to grant "Full Access" select Bulk Sharing (Simple Option) and click Exchange Data Full Access. You can click the Authorize Exchange button.



- b. For properties wishing to grant “Read Only” permission. They can grant “Read Only” access but must also enable “Share Forward” rights. This is done by utilizing the “Custom Access” feature.

MyPortfolio
Sharing
Reporting
Recognition

Share Properties for Exchanging Data

Choose Permissions
Set Up Connections
Check Existing Permissions
View Results/ Confirmation

Sometimes it's really important to be able to share your property with someone else. Use this option to set up automatic exchange of data with your utility or service provider.

1

Select Web Services Provider (Account)

Which web services provider (account) do you want to share these properties with in order to exchange data? You can share multiple properties at once with a single provider.

Select web services provider from my contacts book:

buildee Platform (simuwatt)

Unlike "regular sharing," when you "bulk share" with a Web Service Provider, you can only pick one provider. This is because the bulk share depends on the requirements/settings of the provider.

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.*

One Property
- Select Property -

3

Choose Permissions

If you only need to choose one permission (because you are giving the same permissions for all your shares), you can choose that permission here. Otherwise, you may assign different permissions for different properties and/or contacts on the next screen.

☒ **Bulk Sharing (Simple Option)** - I want to give all my properties and meters the same permissions.

☐ Exchange Data Full Access (with full access to all properties and meters)
☐ Exchange Data Read Only Access (with read only access to all properties and meters)
☒ **Exchange Data Custom Access** (customized access by meter type, such as electricity and gas, for all properties)
☐ Remove Access (i.e. remove existing access to all properties)

☐ **Personalized Sharing ("Custom Orders")** - I want to give different permissions for each property and/or meter.

Authorize Exchange

[Cancel](#)

- i. Specify "Read Only Access" for all items including property information, meter information and goals, improvements & checklists. Make sure that "Share Forward" rights are enabled by clicking the 'Yes' button next to "Share Forward" which is shown in the additional options table. Then click Apply selections at the bottom right hand corner.

Select Custom Access Permissions for Properties and Contacts Selected

Please select the permissions level you would like to grant for each item. If "None" is selected for all items, no share will occur.

Item	None	Read Only Access	Full Access
Property Information	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
▼ All Meter Information	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Goals, Improvements, & Checklists	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Recognition	<input type="radio"/>		<input type="radio"/>

Additional Options:

Item	Yes	No
*Share Forward Allow the person (or people) selected to share the selected properties with others and give them any permissions that they have, including the right to share with more people.	<input checked="" type="radio"/>	<input type="radio"/>

About Permissions

Select permissions for each category. You must provide Read Only or Full Access to the Property Information to share a property

Property Information

Apply Selection

Cancel

11. Now, properties are available for import into builddee and export from builddee to ESPM in the ESPM manager.