

# Benchmarking with Customer Portal Guide

Connecting your Energy Star Portfolio Manager account to the District Energy Customer Portal will automatically transfer your data for benchmarking purposes. Only one representative from your building needs to complete this process.

If you have questions, please contact the District Energy team at 651-297-8955 or [portalhelp@districtenergy.com](mailto:portalhelp@districtenergy.com). Additional resources are on the [District Energy website](#).

## Add Property to Energy Star

Before you begin, add your property to [Energy Star Portfolio Manager](#).

## Combine Building Meters - If You Have Heating & Cooling

If you have heating and cooling services, you must combine meters. First, link your accounts in each building, see page 2 of the [User's Guide](#) for instructions.

To combine building meters, go to the top left **Select Property** tab.

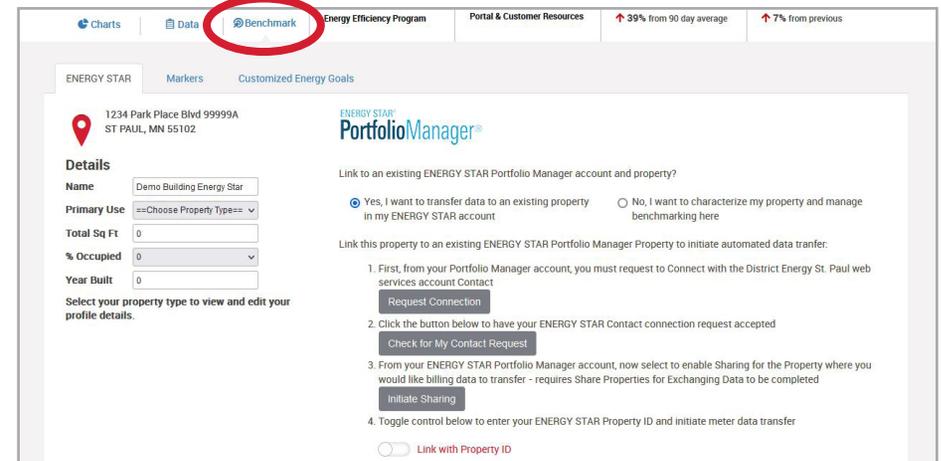
At the bottom of the property list, click **Add New+**.

In the pop up menu, name the meter group "Building Name Energy Star."

Select all of the heating and cooling meters for the building and click save.

## Energy Star Connection and Sharing

In the Customer Portal, go to the **Benchmark** tab. Click **yes**, I want to transfer data to an existing building in my Energy Star account.



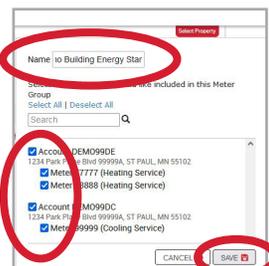
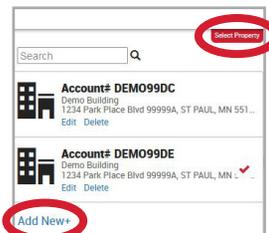
Selecting 1 to **Request Connection** will open a new tab in your browser asking you to sign in to your Energy Star Portfolio Manager account. Once signed in, you will see this screen:



"Ever-Green Energy District Energy St. Paul" is correct.

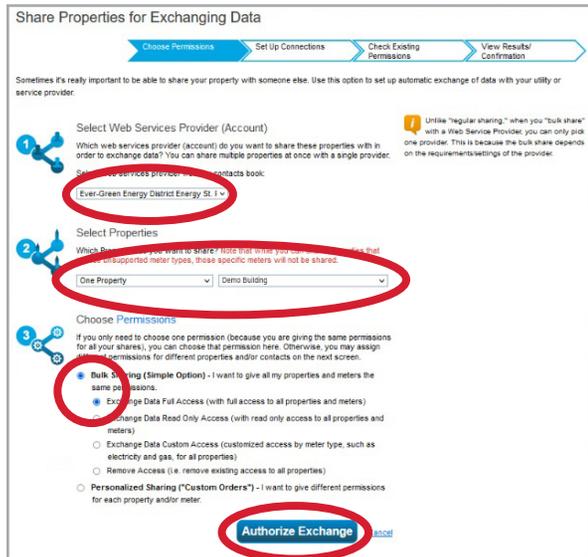
Check the **agreement box** and then the button for **Send Connection Request**.

Navigate back to the Customer Portal tab in your browser. Under item 2 select **Check for My Contact Request**. This will automatically accept the connection request and a small green check mark will appear briefly.



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On the Benchmarking page, under item 3 select **Initiate Sharing** which will open a second Energy Star tab. You will see this screen:



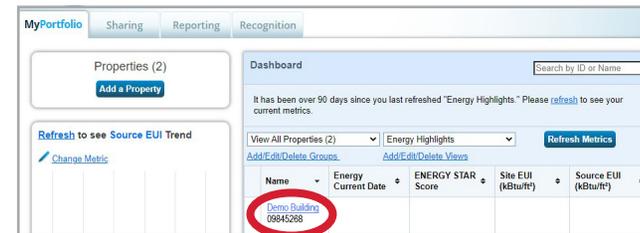
In item 1, Ever-Green Energy District Energy St. Paul (EverGreenEnergy) should auto-fill.

For item 2 click the **Select Properties** button and choose the property. Scroll down and click **Apply Selection**.

For item 3, choose **Bulk Sharing** (Simple Option) and then **Exchange Data Full Access**.

Select **Authorize Exchange**.

While in Energy Star, copy your **property ID number**. In MyPortfolio tab, in the Dashboard section, you can find the **property ID** below the property name.



Navigate back to the Customer Portal tab in your browser. In the Customer Portal Benchmarking screen, toggle the bar to **Link with Property ID**.



A box will pop up asking you to enter the property ID number from Energy Star.



When you select **submit**, a new screen will appear and ask you to verify the property. Confirm the information is correct and select **yes**.

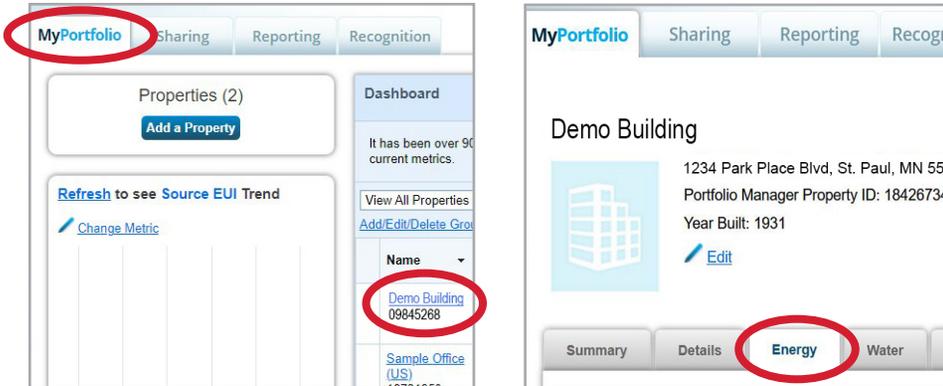


A final confirmation screen will appear to verify meters. Confirm the information is correct and select **submit**.

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## Adjusting Energy Star Meter Dates

Once the connection is complete, go back to Energy Star to adjust meter dates. In MyPortfolio, click on your property and then select the Energy tab.



In the Energy tab, scroll down to see the property's meters. The **Name Meter ID** should match the meter numbers in your Customer Portal account.

Click on the meter name to expand the Basic Meter Information section.

Meters - Used to Compute Metrics (3) [Add A Meter](#)

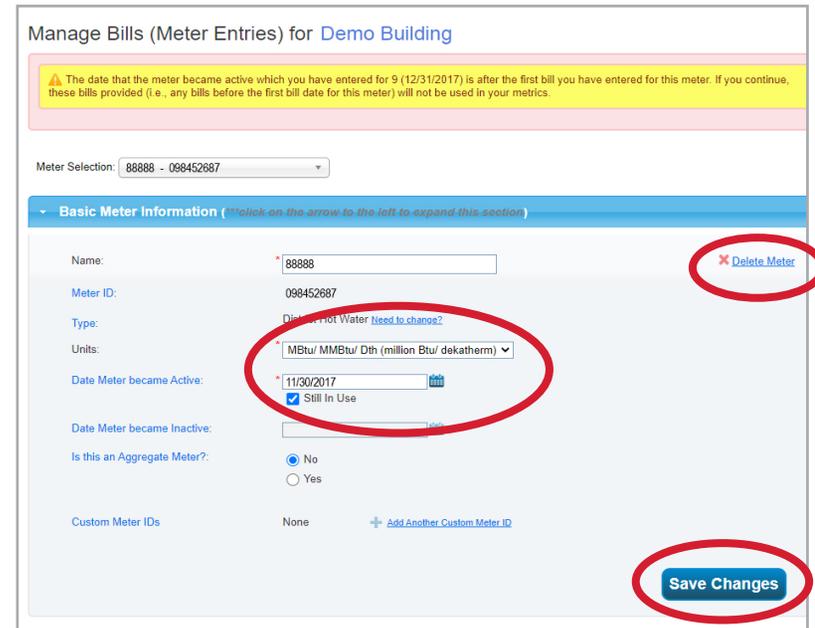
[Change Meter Selections](#)

[View as a Diagram](#)

Name Meter ID	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
88888 098452687	District Hot Water	11/30/2021	Yes
999999 970271426	District Chilled Water - Other	11/30/2021	Yes

Data from the Customer Portal starts on November 30, 2017. If your meters have data before that date, you will see a warning/error message.

To adjust the meter dates, change the **Date Meter became Active from 12/31/17 to 11/30/2017**. Then click **Save Changes**. You will need to adjust the meter dates for each meter.



## Delete or Deactivate Previous Meters

If you have manually entered data for District Energy St. Paul meters, you will need to deactivate or delete those meters.

For data before November 2017, deactivate the meter as of **11/30/2017**. Select the old meter name to get to the Basic Meter Information and uncheck the **Still In Use** box and enter **11/30/2017** as the **Inactive date**.

If your meter data is newer than 2018, delete the meter.