



Connecting with us in Energy Star Portfolio Manager

Step 1:

Click on the "Contacts" section at the top right of your Portfolio Manager account. Then click on the "Add New Contacts/Connections" as shown below.

ENERGY STAR® PortfolioManager®

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

MyPortfolio | Sharing | Reporting | Recognition

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

<input type="checkbox"/>	Name (title)	Organization	Connection Status	Username
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[Delete selected entries](#) [Download all contact information](#)
[Share properties with selected connected contacts](#)

Step 2: Search for Avista.

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, and when they accept the request, they will be added to your Contacts. Second, if the contact 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:

Step 3: Click on "Connect" with Avista Utilities.

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 allow you to view and edit property information within Portfolio Manager.

The screenshot shows a search results interface. On the left, a 'Your Search Criteria' box contains input fields for Name (filled with 'Avista'), Organization, Username, and Email Address, with a 'Search' button below. On the right, a search result card for 'Avista Utilities (AVISTAUTILITY)' is shown, including the text 'Utility Data Sharing with Avista Utilities' and a 'Connect' button. A blue circle highlights the 'Connect' button, and another blue circle highlights the search result card.

Step 4: Complete your contact information and review the Terms of Use, then send the connect request.

The screenshot shows a form titled 'Send a Connection Request to [Avista Utilities](#) to Begin Exchanging Data'. Below the title, there is a paragraph of text explaining the requirements for exchanging data. The form includes several input fields: 'First Name' (with an example 'John'), 'Phone Number' (with an example '5091234567'), 'Email Address' (with an example 'john.smith@comcast.net'), and 'Last Name' (with an example 'Smith'). Below these fields is a 'Terms of Use' section containing a detailed text block. At the bottom, there is an 'Agreement' section with a radio button and the text 'I agree to my provider's ([Avista Utilities](#)) Terms of Use.' A blue circle highlights the 'Send Connection Request' button.

Avista will accept your connection request automatically.